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POLICY AND PROCEDURES MANUAL 2026-27

(Revised Sept 2026)

NCDA opposes discrimination against any individual based on age, culture, disability, ethnicity, race, religion/spirituality, creed, gender, gender identity and expression, sexual orientation, marital/partnership status, language preference, socioeconomic status, or any other personal characteristic not specifically relevant to job performance.

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I. INTRODUCTORY MATERIAL

Preface

The ***NCDA Policy and Procedures Guidelines*** is designed to direct and assist board members and chairpersons of committees to plan, implement, and evaluate the roles and functions of their respective assignments. Due to the continuous changes that affect this document, a revised copy will be posted to the NCDA website.

The content is drawn from three sources: (1) bylaws provisions; (2) Association policy adopted by the board of directors; and (3) operating procedures. These guidelines are not intended to discourage people from using their individual prerogatives and operating styles in their service to NCDA and its members, but only to clarify the policy and procedures by which to deal with the sequence of events requiring their attention throughout the year. The calendar notations provided in each instance are intended to alert the person to the lead-time required for successful accomplishment of various tasks.

Mission and Purpose

The National Career Development Association (NCDA) provides professional development, publications, standards, and advocacy to practitioners and educators who inspire and empower individuals to achieve their career and life goals. (Updated 2014)

Historically, the purpose of NCDA has always been to promote career development of all people over the life span. NCDA is a founding division of the American Counseling Association.

Nondiscrimination Policy

NCDA opposes discrimination against any individual based on age, culture, disability, ethnicity, race, religion/spirituality, creed, gender, gender identity and expression, sexual orientation, marital/partnership status, language preference, socioeconomic status, or any other personal characteristic not specifically relevant to job performance.

Diversity Statement

NCDA acknowledges the worth, dignity, potential, and uniqueness of everyone by honoring diversity and promoting social justice. NCDA views diversity from an intersectional perspective, acknowledging the ways in which identities operate within systems of power, privilege, and oppression. NCDA strives to be a diverse organization in its membership and leadership.

NCDA Training Programs

NCDA supports career development training programs, managed by NCDA's Training and Education Council (TEC) to professionalize the career development field. NCDA's TEC supports: 1) the delivery of Instructor and Master Trainer Training; 2) the updates and distribution of training Curriculum and other related materials; and 3) maintenance of a registry of qualified Instructors and Master Trainers for each training program. The training programs include Facilitating Career Development curriculum, first copyrighted by NCDA in 2000 and was most recently revised in 2023. This is the major curriculum used to train career services providers. Completers are eligible for the Certified Career Services Provider (CCSP) upon successful completion.

In addition, NCDA also promotes efforts to support the School Career Development Advisor (SCDA) and associated NCDA trademarked Certified School Career Development Advisor (CSCDA) credential, as well as the Career Practitioner Supervision (CPS) and associated NCDA trademarked Certified Clinical Supervisor for Career Counseling (CCSCC) credential. The Offender Workforce Development Specialist (OWDS) Training Program is a corrections "adaptation" of the FCD Training Program, provided to those in the corrections system responsible for offender reentry in the workforce. Those completers are eligible for the CCSP.

NCDA Policy Statements

NCDA has long been active in developing policy statements to guide consumers of career services, career providers, publishers and developers, policy makers, and others. These policy statements may be reproduced and used without prior approval from NCDA if the user includes the following statement: "This statement was developed by the National Career Development Association, 2468 W. New Orleans Street, Suite A, Broken Arrow, OK 74011." They may be accessed on our website at http://www.ncda.org.

- **Career Counselor Assessment and Evaluation Competencies (NCDA-ACES)** - The purpose of these competencies is to provide a description of the knowledge and skills that career counselors must demonstrate in the areas of assessment and evaluation. Because effectiveness in assessment and evaluation is critical to effective career counseling, these competencies are critical for career counselor practice and service to students, clients, and other customers.
- **Career Development Policy Statement** – Includes definition of career development with basic considerations for grades K-6, grades 7-9, grades 10-12, and adults.
- **Consumer Guidelines for Selecting a Career Counselor** – Help consumers of career counseling understand and select career services.
- **Diversity and Non-Discrimination Clauses** – Includes NCDA's position to encourage worth and potential of all people.
- **Ethical Standards "Code of Ethics"** – Standards of professional practice including general, counseling relationship, measurement and evaluation, research and publication, consulting, private practices, and procedures for processing ethical complaints.
- **Ethical Use of Social Networking Technologies in Career Services -** This paper shares the results of the NCDA Ethics Committee's comprehensive review of literature about the use of social networking technologies in practice by career professionals and those in related helping professions.
- **Multicultural Career Counseling Competencies** – Minimum competencies for those professional career counselors at or above the master's degree level of education.
- **National Career Development Guidelines** (NCDG) - developed by the America's Career Resource Network, through funding from the US Department of Education, Office of Vocational and Adult Education. The US DOE granted NCDA the rights to the NCDG in 2012.

Process of Career Development

Career development is a continuous life process through which individuals explore activities, make decisions, and assume a variety of roles. Careers are formulated by the continuous evaluation of personal goals and the perception, assessment, and decisions regarding opportunities to achieve those goals. Career development occurs as educational and vocational pursuits interact with personal goals. It continues over the life span.

Career Development as a Part of Human Development

As with other normal aspects of human development, career development is not totally dependent upon external forces or programs. Rather, it reflects a personal growth pattern that, in some respects, differs for each individual. However, there are certain common development patterns of growth and career sequence.

Certain basic principles regarding human development apply whether one speaks about physical, emotional, intellectual, social, spiritual or career development. At least seven development dimensions are important in the design and implementation of programs for career development:

1. Development occurs during the lifetime of an individual. It can be described in maturational forms denoting progression through life stages and the mastery of developmental tasks at each stage.

2. Individual development is influenced by both heredity and environment. Psychological, sociological, educational political, economic, spiritual and physical factors affect development. Appropriate intervention strategies that focus upon these factors can influence the quality of individual development.

3. Development is a continuous process. Individual development can be best facilitated by intervention strategies that begin in the early years and are available throughout life. Programs designed to impact only at certain points or on certain aspects of the individual's life have limited effectiveness.

4. Although development is continuous, certain aspects are dominant at various periods in the life span. Programs designed to facilitate career development should account for the dominant aspects at given stages.

5. Individual development involves a progressive differentiation and integration of the person's self and his/her perceived world. Intervention strategies need to be designed to assist individuals during normal maturational stages of career development in addition to providing remedial assistance to individuals whose development has been damaged.

6. While common developmental stages can be observed and described during childhood and adult life, individual differences in progressing through these stages can be expected. Intervention programs should provide for these differences, making no assumption that something is "wrong" with those who progress at atypical rates.

7. Excessive deprivation with respect to any single aspect of human development can delay optimal development in other areas. Optimal human development programs are comprehensive in nature, not limited to any single objective. It is recognized that those who suffer from deprivation may require special and intensive assistance. Where deprivation is long term, short-term intervention is not likely to be sufficient.

These principles provide the foundation for building a career guidance program that will have constructive, educational, and beneficial influence in increasing human potential and providing the means for its development and expression.

The Nature of Career Development

(Adapted from joint position paper of NCDA and the Association for Career and Technical Education)

The nature of guidance for career development cannot be viewed as a static, tradition-based set of related services that assist individuals in making single occupational choices. The content of any career guidance program must be developed from an initial assessment of the present and future career development needs of the individual; it must also account for impinging environmental factors that could affect the development and fulfillment of career expectations. Career guidance content can be organized in many ways to facilitate individual development. Whatever its form, the program should encourage individuals to assume responsibility for their own career development.

A career guidance program assists the individual to assimilate and integrate knowledge, experience and appreciations related to:

1. Self-understanding, which includes a person's relationship to his or her own characteristics and perceptions, and to others and the environment.
2. Understanding of the work society and technological, social, political, and economic factors that affect its constant change, including workers attitudes and discipline.
3. Awareness of the part leisure time may play in a person's life.
4. Understanding of the information and skills necessary to achieve self-fulfillment in work and leisure.
5. Understanding of the necessity for and the multitude of factors to be considered in career planning.

An illumination of these content areas may include career guidance experiences to ensure that individuals:

- Gather the kinds of data necessary to make rational career decisions.
- Understand the necessary considerations for making choices and accept responsibility for the decisions that are made.
- Explore the possible rewards and satisfactions associated with each career choice considered.
- Develop through work the attitudes that they are contributors to life and community.
- Determine success and failure probabilities in any occupational options.
- Show an understanding of the varied attitudes toward work and workers held by themselves and by others.
- Recognize how workers can bring dignity to their work.
- Consider the possible and even predictable value changes in society, which could affect a person's life.

- Understand the important role of interpersonal and basic employment skills in occupational success.
- Clarify the different values and attitudes individuals may hold and the possible effects these may have on decisions and choices.
- Understand that career development is lifelong, based on a sequential series of educational and occupational choices.
- Determine the possible personal risk, cost, and other related consequences of each career decision and be willing to assume responsibility for each consequence.
- Systematically analyze school and non-school experiences as they plan and make career-related decisions.
- Explore the worker characteristics and work skills necessary to achieve success in occupational areas under consideration.
- Identify and use a wide variety of resources in the school and community to maximize career development potential.
- Know and understand the entrance, transition, and decision points in education and the problems of adjustment that might occur in relation to these points.
- Obtain necessary employability skills and use available placement services to gain satisfactory entry into employment in line with occupational aspiration and competencies.

Research

Identifying and Support Career Research

Career counseling, guidance, education, and development advocates, including NCDA, need to build adequate empirical research evidence to support career development and intervention program efforts. The following list is suggestive of the types of research needs that currently exist:

1. Longitudinal studies examine the effects of particular career development and intervention activities on career development of all populations including the career and academic development of K-12 students.
2. Research concerning the influence of work and educational environments on the career development of students.
3. Studies on the effects of environmental change on the coping and adjustment of workers.
4. Research to validate career development theories and interventions.

NCDA should attempt to accomplish the following research objectives:

1. Identify the scope of research—long-term and short-term—that needs to be conducted in the area of career counseling, development, guidance, education, and intervention.
2. Determine appropriate studies that will meet policy decision needs while building on previous work and providing quality research as a basis for relevant subsequent studies.
3. Conduct and support research on both national priorities and problems recognized as gaps in the existing research literature.
4. Review current research and communicate research needs to the research community.
5. Consult and participate in research activities conducted by others.

Policies Concerning the Use of the NCDA Membership Database

NCDA occasionally receives requests to contact its membership for research purposes. In order to protect our members' privacy, and ensure that surveys are conducted ethically, pragmatically, and meet necessary standards of quality, the board has accepted the following policies and procedures.

The NCDA Research Committee will accept requests from individuals seeking access to the membership for the purposes of conducting research surveys. The following policy statement summarizes the required procedures for requesting access to the NCDA membership for research purposes.

1. All requests must be submitted to the NCDA Research Committee Chair at least four weeks prior to the proposed date for contacting members.
2. The Research Committee Chair and at least one other committee member will review all requests to determine if proposals meet NCDA standards and recommend appropriate procedures for accessing members.
3. Requests must include the following information:

a. Research proposal including any potential contributions to the field of career development.
b. Brief synopsis of the research study.
c. Copies of recruitment e-mail announcements to be distributed to the NCDA membership (one page or less).
d. A copy of the local Institutional Review Board (IRB) documentation and, once approved by NCDA, a copy of the approval.
e. Plans for disseminating the findings through writing, presentations, and other methods.
f. Researchers agree to use the information for specified purpose only

4. A copy of the final research report (prepared based on the data collected in conjunction with the research investigation) must be submitted to the Chair of the NCDA Research Committee within six months upon completion of the study.

The NCDA Research Committee Chair will inform the researcher of the committee's decision within three weeks. If the request is approved, the NCDA Research Committee Chair will forward the research recruitment email to NCDA Headquarters for electronic distribution.

II. GOVERNANCE ORGANIZATION

Board of Directors

Responsibilities

The Board of Directors shall constitute the administrative body of NCDA and its principal duties shall be to set policy and to give direction to the Association. The Board of Directors shall carry out the policies of the Association and speak on its behalf.

The professional responsibility of the NCDA Board of Directors extends beyond that of the normal NCDA membership and, thus, the officer shall assume the responsibilities of attendance at meetings as well as other tasks of the office. It is an honor and a recognition of professional integrity to be elected to the Board of Directors, and Board Membership carries with it significant responsibility. Engagement and timely attention to responsibilities, including thoughtful review of written material or media prior to engagement and decision-making is expected. Likewise, comprehension of the current Policy & Procedures Manual is expected.

Structure

The Board of Directors shall consist of the president, the president-elect, the president-elect-elect, the past president, secretary, treasurer, ACA Advisory Council representative, and six trustees. The Executive Committee shall consist of president, president-elect, president-elect-elect, past-president, and the executive director.

Ex-officio Members

The *ex-officio* members of the board, who serve without vote, can include representatives of various groups and agencies such as guidance-related, non-ACA Associations, guidance representatives from federal agencies, other ACA divisions or affiliated Associations, or NCDA staff members.

The NCDA Board as a whole must make appointments for all *ex-officio* members. It is the responsibility of the president to remain sensitive to persons who should serve in this capacity and recommend them for board approval. No funds will be expended for the support of *ex-officio* members, but they will be encouraged to attend and participate in all board meetings and other Association affairs.

Organization and Function of the Board

The primary duties of the Board of Directors shall be to set policy and to give direction to the Association. The president shall appoint a board member to serve as a board liaison member to each standing committee, ad hoc committee, task force or commission. It is expected that board members will communicate with their board committees at least monthly to ensure proper communication and attention. At the request of the president, individual members of the board may be asked to represent both the board and the Association at meetings or activities to which NCDA has been invited to have representation. Travel for state division activities is supported by the state division except where otherwise indicated, for example, state/organizational leadership training provided by NCDA. Geographic location and travel funds are taken into consideration when selecting members for the purpose. Board policies may be amended by a majority vote at any regular or special meetings of the board. The Board of Directors shall also be responsible for nominating NCDA members for ACA president.

Meetings

The board shall meet in person three times per year and full attendance is expected (one meeting may be missed per fiscal year, but only in case of emergency). The first meeting will be held at the beginning of the fiscal year (October). A second meeting will be held mid-year. Locations of these first two meetings will be selected by the president, in consultation with the board. The final meeting shall be held at the time and place of the annual global conference (summer), herein called the Conference. Domestic travel expenses will be covered by the association. For international board members, NCDA will cover airfare to/from the city of US origin to the meeting site. International airfare is the board member(s)' responsibility from his/her home base to the nearest entry city into the US. If an international board member flies directly into the meeting city, airfare will be reimbursed at a rate equal to that of the most expensive domestic airline rate among the board members.

Other meetings of the board may be held at the call of the president or of a majority of the board. For teleconference calls, domestic phone charges will be supported by the association. International board members will be responsible for attending and any international charges that result. At least one-half of the members of the board shall constitute a quorum throughout any meeting of the board at which official business is transacted. All meetings of the Board of Directors, except executive sessions, shall be open to any member of NCDA. Copies of the minutes of all meetings of the Board of Directors shall be distributed to members of the board. In addition to attending the three meetings of the full board of directors, the Executive Committee may meet immediately prior to these three meetings and may meet on a fourth occasion at the ACA Convention. Repeated missed meetings and/or failure to perform as a board liaison may result in the removal from the NCDA Board.

Meeting agenda and other relevant documents (including travel logistics) will be posted on the secured Board-Only webpage in advance of the meeting.

Board Travel and Reimbursement

Members of the board shall be reimbursed according to the established travel policy (see Appendix O) regarding NCDA board per diem and travel schedule when attending scheduled board meetings. All claims will be submitted on an approved travel template per the logistics that are sent before each meeting. The completed template shall be sent electronically to both the treasurer and to Headquarters. A signed copy with all necessary receipts and related documentation should be mailed, faxed, or e-mailed to Headquarters. The treasurer will then authorize such payments, and Headquarters will issue the reimbursement check. The board will be reimbursed for travel to Board meetings as specified by the NCDA Treasurer. Expenses to be reimbursed must be submitted within 60 days of the time that the expenses were incurred. Failure to do so will result in non-payments. Appeals to this policy may be made to the Executive Committee. The following are guidelines pertinent to reimbursement of board members for travel and per diem to meetings or meetings of the board, excluding meetings at the national convention.

1. Room at meeting hotel will be covered in full. Travel will be reimbursed at the lowest available domestic, economy/coach airfare at least 60 days in advance unless approved in writing by the treasurer. For international board members, NCDA will cover airfare to/from the city of US origin to the meeting site. International airfare is the board member(s)' responsibility from his/her home base to the nearest entry city into the US. If an international board member flies directly into the meeting city, airfare will be reimbursed at a rate equal to that of the most expensive domestic airline rate among the board members.
2. Ground transportation cost will be honored upon presentation of receipt.
3. Meals will be reimbursed in accordance with the current NCDA per diem rate.
4. Miscellaneous expenses (e.g., copying, shipping, etc.) will be reimbursed upon presentation of receipts. These expenses need to be authorized in advance by the president if they exceed $25.
5. Mileage will be reimbursed in accordance with the prevailing federal rate – annually reviewed on October 1 each year.
6. Board members may drive personal vehicles to board meetings. Reimbursement is based on the actual mileage rate OR the lowest available 60-day advance economy airfare rate, whichever is lower. The board member is responsible for researching advance airfare rates and submitting documentation of what the cost would have been.
7. NCDA authorized travel service, such as RouteSpring.com may be offered and utilized for NCDA travel arrangements.

Board members' travel plus hotel and per diem expenses will be paid for conference meetings, as outlined annually by the treasurer. An average of each trip's expenses will be projected and included in the budget each year.

Board Contingency Travel (Collaborations) and Reimbursement

Each year, NCDA will set aside a Board Contingency Travel Fund to support the travel for board members who represent the association at industry conferences, board meetings, government relations functions, state division events, and other such events that are crucial to NCDA collaborations. The president and president-elect have their own travel budgets and should be utilized first for their own needs. They will donate any remainder of these travel funds for the other board members to use. A contingency fund will also be established to support this travel.

A list of these organizations and government/legislative endeavors are established annually by the NCDA Board of Directors. Board members will be assigned a liaison role with the above-named group/organization aligning with their area of interest, through their role as Trustee or as a president. These roles will be determined at the October board meeting, and as new formalized collaborations arise during the year.

The presidents along with the executive director, will determine the appropriate use of the travel monies for these events. The board members that is serving as liaison will report on their attendance and outcomes, at the next scheduled board meeting.

The Board has established a Travel Policy for State Division Events:

Summary:
The purpose of this document is to outline guidelines for board member travel to state CDA events. NCDA provides monetary support for board members travel to state CDA events to be speakers on topics selected by the state CDA. Note: When representing NCDA and/or travelling with support from NCDA, Board Members will not accept a stipend. Board members cannot accept any form of payment or honorarium for their speaking engagements.

Guidelines:
Funds available for board member travel will vary by NCDA budget year. The number of states selected will be based on the budget available each year.

State CDA travel requests will be evaluated based on the following criteria:

- Economical use of NCDA funds and effective use of board member time at the event
- State CDA fund contributed to the overall event
- The concept of the event is detailed and shows alignment with board member expertise/speaking areas
- Timing of event – can't conflict with board member travel to NCDA board meetings

Deadlines:

- These will be announced each year and will generally be October 1st for spring and summer events and July 15th for fall events, but these dates can change.
- Be sure to read all e-mails received from the State Trustee for most accurate deadlines.
- Evaluation priority will be given to those state CDAs who submit by the deadlines. However, if travel funds remain and a state CDA submits after the deadlines, those will be considered.

Board E-Mail Vote Process

The NCDA Board of Directors may make official votes by e-mail in accord with the following process to be administered by the NCDA Secretary:

1. When it becomes clear that all of the agenda items will not be covered in a Board meeting, the president indicates what items will be handled in an e-mail vote format. The president then asks for a motion/second for each item (as appropriate). The item is tabled for discussion and vote via e-mail. The president sends out the call for the e-mail vote.
2. If NCDA business occurs between Board meetings that require action, the Board will be sent necessary background information. The president will secure a motion and second to begin the e-mail vote and discussion process.
3. A quorum of Board members must confirm receipt, by e-mail, of the information as stated in #2.
4. If there is more than one item to be discussed and/or voted on, the Secretary will send the general call for an e-mail vote and then send a separate e-mail for each item with the Subject line clearly stating the topic.
5. During the 5 business days following the establishment of a quorum, Board members will discuss the motion. At the end of the discussion period, the president calls for the vote and sets a date by which all votes must be cast. If necessary, the president may extend the discussion period.
6. Board members will cast their vote (yes, no abstain, recuse) on or before the set date. Votes will be broadcast to the entire board.
7. The president and/or executive director will tabulate the votes will broadcast the results to the Board within 24 hours of the vote deadline.
8. Board members will confirm receipt of the results by e-mail.

9. The Secretary will record the motion, discussion, and vote in written form and will transmit the information to the Board and to NCDA Headquarters for storage in the NCDA Archives.

Orientation of New Board Members

Without the planned orientation of new board members and the passing on of all archives associated with the responsibilities, the Association loses much time and progress. It is necessary for the following procedures to be followed on an annual basis. All retiring board members should establish a method of accomplishing the following prior to September 30th of any given year:

1. Instruct new members of past year's events and describe current major activities and issues facing the Association.

2. Transfer those materials that are deemed necessary for the new board member to prepare for his/her future role.

3. Suggest issues that should be considered by the board regarding specific roles and responsibilities of outgoing board members.

4. Instruct the new board member on how the NCDA board/Association operates its meetings and special events.

5. Incoming board members are encouraged to attend the Board of Directors meeting during the election (held in conjunction with the annual conference) as guests. Immediately following their election, board members are encouraged to attend the Board call (usually held in September; They will be considered an ex-officio board member participating in discussions but without vote

6. Incoming board members will be given an orientation to the Board of Directors, the Policies and Procedures of the organization, and the access code to the secure Board webpage. They are encouraged to be familiar with the NCDA website including the review the video tour of the NCDA Website provided by the website director.

7. Outgoing board members are expected to attend all board functions until September 30th. After serving on the Board, they are considered as a member of the organization's Brain Trust.

Ideally, this orientation could be efficiently conducted prior to the first meeting in October. It would also be appropriate for the past president and the president-elect to conduct a group meeting of both outgoing and incoming board members.

Honoraria

Current NCDA board members and Brain Trust members may not accept an honorarium when speaking as a representative of the organization and travel is being covered by the association.

Conflict of Interest

The NCDA Leadership Team (LT), including Board Members, Committee Chairs, Credentialing Commissioners, members of the Training and Education Council and Headquarters Staff, must avoid a conflict of interest with respect to their fiduciary responsibility and their role as a leader of the association. Every effort should be made by LT members to avoid engaging in activities that may result in an appearance of unfair advantage or favoritism. Full transparency surrounding these issues is paramount. Examples of activities that may give the appearance of favoritism include, but are not limited to:

- Being offered an honorarium to speak to an organization as a representative of the NCDA Board while serving on the NCDA board.
- Contracting to write an NCDA monograph and receiving royalties from that contract while on serving on the board.

- Using insider knowledge of conference and institute dates to schedule FCD trainings (and other trainings for credentialing) that bump against those conferences and institutes.
- Receiving an honorarium or expenses paid for offering a PDI that bumps against those conferences and institutes; or
- Applying to NCDA Requests for Proposals while serving on the board.

The LT will be asked to sign the Conflict of Interest/Disclosure Statement Annually as shown on Appendix I. New Leadership Team (LT) members will be informed of their duty to disclose and will fill out a document outlining any standing issues as they move into a leadership position. This document will include a section wherein the LT member agrees to this policy. As other issues arise, immediate full disclosure to NCDA President and NCDA executive director is expected. Completed forms will be collected by the executive director annually and will be kept on file at the NCDA Headquarters Office.

If anyone has reasonable cause to believe that a member of the Leadership Team (LT) has failed to disclose actual or possible conflicts of interest, the member of interest should be approached directly and privately first and given the opportunity to address the concern. If, after hearing the response, the concern about a failure to report an actual or possible conflict of interest still exists, the concern should be shared with the president. The president shall bring the concern to the Board.

For full transparency, the minutes of the NCDA board must contain the names of the individuals who disclosed or were otherwise found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present, and the board's decision as to whether a conflict of interest in fact existed. In addition, the names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection therewith will also be included in the minutes.

Individuals with potential conflicts of interest must recuse themselves from related discussions, including board discussions related to possible resolutions. The remaining board will decide if a conflict of interest exists and make recommendations. Possible resolutions may include, but are not limited to;

- A decision of no recommendation (i.e., the conflict of interest is deemed to have minimal potential impact or may have a positive impact on NCDA),
- Recusal from related discussion, debate or decision making,
- Cessation of the issue causing conflict of interest of appearance thereof, or
- In rare cases, removal from the leadership position

NCDA Headquarters

NCDA Headquarters serves as the central office of the executive director and the management team. Its location, ownership, management and maintenance is determined by the management contract. Currently it is located at 2468 W. New Orleans Street, Suite A, Broken Arrow, OK 74011. This is in the Central time zone, however for most reporting and scheduling purposes, the Eastern time zone will be followed.

The major functions of NCDA Headquarters include management services, member/leader services, publications/marketing support, accounting/database services, meeting/vendor services, and development services. Headquarters also oversees contracted services including accounting, audit, investments, ACA management services, legal services, database design, communications, and website development and maintenance.

The executive director is responsible for the association's management services, including hiring and supervising staff, managing contracted services, upgrading technology, serving ex-officio on Board and Executive Committee, fiscal management, providing first contact on public relations, cultivating sponsorships and grants, oversight of grants and projects, supporting government relations, and networking with the other Associations. In addition, the executive director, in consultation with the president, is responsible for updating the NCDA Policy and Procedures Manual and Annual Report annually. The Annual Report contains financial /audit reports, a membership report, and any other pertinent association information for the year. The reports from the standing and special committees, officer reports,

minutes from the previous Annual Meeting and minutes from all board meetings shall be posted on the NCDA Website. A summary of the Annual Report should be sent to the website director.

The NCDA Board of Directors evaluates the performance of the executive director at the end of each fiscal year. Details are included in Appendix N. The president has the responsibility for this process. The president recommends, and the Board approves, management fee adjustments and/or contract extensions for the management contract.

Annual Meeting

The Association shall hold an Annual Meeting at a time and place of the Conference. The Board shall give written notice to the membership no less than six months in advance of the Annual Meeting. The Association may hold other meetings at a time and place fixed by the Board, which shall give reasonable notice to the membership.

All NCDA members in good standing are invited to attend and vote. The quorum at the Annual Meeting shall be the number of members in good standing in attendance. The members in attendance will be asked to act on recommendations of the Board, review policies established by the Board, act on reports of the Board, state divisions, standing committees, and such special and continuing committees. In addition, the members in attendance will be asked to approve an elections slate of nominees for various open board positions, and members to the NCDA Nominations and Elections Committee.

The members in attendance at the Annual Meeting will review and forward amendments to the Bylaws as presented by the Board to the total membership for approval in accordance with Article XII. NCDA recognizes the website www.ncda.org as the official communication center of the association. NCDA will use the website as an important delivery method of communication to the membership. Notification of amendments and voting will be communicated via *Career Developments* or *Career Convergence* in addition to website posting.

In an emergency and on the recommendation of two-thirds vote of the Board, business may be presented by mail or E-mail ballot to the membership. Such ballots should be taken by the Secretary of NCDA and shall have the same effect as if said action had taken place at the Annual Meeting.

Parliamentarian

A parliamentarian may be appointed by the president or executive director. The person must be a current member of the Association.

The duties of this position shall be to assist the president during the Annual Meeting and at any other meetings designated by the president to assure that Roberts' Rules of Order are applied. The official guide for all meetings shall be the revised Roberts' Rules of Order.

Standing and Special Committees

The Board may create and dissolve committees, councils, and other working groups as needed to address needs of the Association. Standing Committees are distinguished from other committees by their connection to the ongoing operations or core values of the Association.

The organizational structure of the groups is discussed in more detail in the operational sections of the manual. Each group will provide an annual written report of its activities and status to the board for inclusion in the website. Chairpersons shall designate their membership unless otherwise specified by the Board of Directors. Chairpersons and members shall serve for designated terms or until the appointment of their successors.

Resource Development

It is the position of NCDA that external and non-membership funds be promoted and secured only if:

1. The purpose of the grant/gift/contract is directly related to the mission and scheduled priorities of the Association.

2. The purpose of the grant/gift/contract allows the Association to conduct research and disseminate its results through publication or training events.

3. The purpose of the grant/gift/contract promotes working relationships with groups, organizations, or agencies that are in the best interest of the Association.

The executive director, in consultation with the president, can negotiate on behalf of the Association regarding the acceptance of external funds. When opportunities exist, the executive director or a member must inform the president of the source, purpose, and benefit of the external funds. The president will, in turn, decide if the opportunity is appropriate and communicate with the board regarding its disposition.

Once external funding is approved, the president and treasurer will apprise the NCDA Headquarters of such action and establish a special budget account for the funds. Policies concerning such matters as staff hiring, equipment acquisition, and other arrangements will be established by the Board of Directors as specific needs arise.

NCDA has established a partnership checklist to evaluate future collaborations. Appendix G outlines the criteria and process that should be followed.

III. GOVERNANCE OPERATION
(JOB DESCRIPTIONS, PROCEDURES, AND TIMING)

President

The president is responsible for managing the governance of the Association. This responsibility begins in the president-elect-elect year and continues throughout the presidential year. A presidential stipend will be paid annually. The amount of that stipend shall be decided annually by the board of directors. The president shall hold office for a one-year term and then succeed to past-president for a one-year term. The president shall be ineligible to serve again as president-elect-elect or president for a period of five years following service as president.

The functions of the president shall be to: (a) exert leadership in the achievement of the purposes of NCDA, (b) preside at Annual Membership Meeting, (c) preside over meetings of the Board of Directors, Executive Committee, and Annual Membership Meeting, (d) appoint chairpersons of all vacancies to NCDA standing committees, and special interest groups, and other committees (subject to confirmation of the board), (e) serve ex-officio on all NCDA committees, (f) serve as a member of the Nominations and Elections Committee, (g) be empowered to enter the Association into contracts, grants, and other binding agreements upon approval of the board, (h) prepare and distribute to each Board of Directors member prior to each Board meeting an agenda and supplemental reports and action items for Board consideration, and (i) initiate and conduct an annual performance evaluation of the executive director and, with the treasurer, make a recommendation for changes to the management services agreement based on the results of such an evaluation.

After committee appointments have been confirmed, the president should provide to the chairperson: (a) the committee's goals and objectives from the Annual Plan, (b) information regarding the budget for its operations and direct the chairperson's correspondence concerning vouchers and payments to the treasurer, (c) instructions to establish contact with the NCDA board if a publication is planned, (d) the name and contact information for the liaison to whom the committee/commission will report, and (f) materials and timelines for developing a program of work.

Following the NCDA election, NCDA headquarters will notify the NCDA president of the candidates for office who have been elected; the president will in turn notify all candidates of these results, inviting the successful individuals to attend and observe the Conference Board of Directors meetings. In addition, the president sends a copy of the previous minutes and the Policy and Procedures Manual to all newly elected Board members.

The president is responsible for the Annual Report. Usually, the president charges the secretary and headquarters staff with the task of compiling and disseminating the report. The trustees communicate with their committee chairpersons to have their reports completed and sent two months prior to the end of the fiscal year so that the report can be posted by October 30th.

The president is responsible for all of the NCDA activities at the ACA Convention and the NCDA Conference and, although the executive director and other conference planning staff coordinate many of these activities, the president has several distinct responsibilities at the Conference:

1. The president may present a “state of the Association” address during the Annual Membership Meeting at the Conference.

2. The president is responsible for instructing the staff on procedures for the invitation list (all conference attendees from outside of the USA, past NVGA/NCDA presidents, past Eminent Career Awardees, Board of Directors, Committee Chairs, State Division Presidents, etc.) for any special events hosted at the Conference.

3. The president is responsible for developing a program related to the conference. The Awards information should be included in the conference program, along with a list of past NVGA/NCDA presidents, past Eminent Career Awardees, and current Board of Directors members.

In addition, depending upon monies available and the Conference activities, the president gives the executive director instructions regarding other social functions desired. Typical social events may include receptions in the president’s suite and meals/beverages needed. The president schedules all NCDA ancillary programs at the annual ACA convention and the Conference.

The president should monitor the work of the NCDA Conference Program Committee and should be aware of committee membership and criteria used for selection of NCDA convention programs. Special attention should be given to the appropriate scheduling of ancillary program activities.

The president or designate should represent NCDA at state and regional meetings of NCDA groups and international meetings to the extent feasible. It is expected that state divisions or international entities will pay travel expenses, however, the president has discretion to use NCDA funds to travel to state division or international activities within the scope of the president’s budget.

The president shall be responsible for casting votes at the IAEVG election. If the president is not able to attend the IAEVG meeting, he/she may recommend a designee to the board. The designee is subject to board approval prior to the vote at the IAEVG Conference. The president should consider a board member first before recommending another member. An individual running for IAEVG elections is not eligible to cast the NCDA votes.

Calendar of Presidential Activities

July (as president-elect)	Appoint committee chairs and board liaisons. Develop a Planning Calendar with the executive director and plan face-to-face meetings and teleconference calls for the following year. Disseminate to all new and returning board members.
August/September	If an NCDA Board or Executive Meeting is planned at the ACA Conference, the president should send the schedule of all events to ACA’s Conference Management to secure the space.
	Convene Finance Committee along with the Treasurer to discuss budget.
September	Write President’s Column and send to the magazine editor for winter issue.
October (As president)	Prepare agenda and board materials for the first board meeting; Conduct first board conference call or on-site meeting and follow-up on board actions. Draft final annual plan, program of work, and budget for presentation and approval by Board of Directors. Conduct a Committee/Council focus call and begin convention planning with convention committees.
December	Write President’s Column and send to the magazine editor for Spring issue. Preside at board meeting. Follow up on board actions.

March/April	Preside over the NCDA Activities at ACA Convention if applicable. Send final copy of President's Report column to Career Developments for the summer issue.
May	Assemble and reproduce the Annual Report in cooperation with the executive director.
June	Write President's Column and send to the magazine editor for fall issue.
June/July	At the Conference, preside at Board of Directors meeting, Annual Meeting, and Awards Program. Host board orientation for new board members.
August/September	Notify all candidates of election results. Complete all convention arrangements for ACA. Preside at board meeting. Follow up on board actions. Remind board members to solicit reports from all committees.

President-Elect

The president-elect shall be elected annually and shall hold office for one year. Ideally, the president-elect should have previous board experience. The president-elect succeeds to the presidency for a one-year term and then to the past presidency for a one-year term and may be awarded a stipend by the Board (determined annually). In the event that the president-elect cannot succeed to the presidency, the Board of Directors may, by majority vote, choose a member of the board to serve as president. The term of office shall commence on October 1.

The functions of the president-elect shall be to (a) perform the duties of the president in the absence or incapacity of the president, (b) serve as a member of the Executive Committee, (c) attend and support ACA meetings immediately prior to assumption of office with payment of expenses by NCDA, (d) plan the national conference for the following year, and (e) carry out such other duties and responsibilities as may be assigned by the board as prescribed in the bylaws of ACA for presidents-elect of ACA divisions. In addition, the president-elect also acts as liaison to all committees with the support of the President's vision. The president-elect plans the direction of emphasis of his/her forthcoming presidential term of office with the assistance of the board.

In preparation for the convention to be held during that person's presidency, the president-elect selects chairpersons for convention program so that the new chairpersons can observe procedures at the convention prior to the one for which they will be responsible.

Calendar

Fall	Conduct a Committee/Council focus call.
Spring	Set the conference theme, agenda and budget, select Program Chair; communicate with host state division
Summer	Begin making arrangements to appoint chairpersons to standing committees and councils needing replacements. Evaluate and make recommended changes to the Strategic Plan. Attend all Board of Directors meetings and Annual Meeting at the annual Conference.
Fall and Board's	Finalize all appointments. Complete appointments of committee and commission chairpersons and work with new chairperson to develop budget proposals. Finalize Strategic Plan Annual Plan. Prepare tentative budget. Present a list of committee chairs for the approval. Selection locations for Institutes for following year. Review and plan a revision of the Strategic Plan with full board.

President-Elect-Elect

The president-elect-elect shall be elected annually and shall hold office for one year. Ideally, the president-elect-elect should have previous board experience. The president-elect-elect succeeds to the president-elect position and then on to the presidency for a one-year term. In addition, he/she will serve as past presidency for a one-year term following the presidency. In the event that the president-elect-elect cannot succeed to the presidency, the Board of Directors may, by majority vote, choose a member of the board to serve as president. The term of each office shall commence on October 1.

The functions of the president-elect-elect shall be to (a) support the efforts of the president-elect and president, (b) serve as a member of the Executive Committee, (c) plan the national conference for his/her respective conference year, (d) collaborate with the President and president-elect in the leadership of the Association. The president-elect-elect plans the direction of emphasis of his/her forthcoming presidential term of office with the assistance of the board.

Past-President

The immediate past-president shall serve on the Board of Directors and as an advisor at the Annual Meeting. The past-president serves as liaison to the Eminent Career Award Committee, the Fellows Committee, and as a member of the Awards Committee.

The past-president shall serve as chairperson of the NCDA Committee on Nominations and Elections and will organize and carry out the functions of the committee as described under the committee section of this manual.

The past-president will chair a committee of the president, president-elect, past-president and executive director to appoint NCDA representatives to ACA standing committees. Members of this committee may not be nominated by NCDA to serve on an ACA standing committee during their term of service.

Calendar

Throughout	Attend all Board meetings
Summer	Attend Board of Directors meeting at the conference.
Fall	Contact Eminent Career Award committee and Fellow's committee. Send nominations information to NCDA Magazine and Website Directors. Assist NCDA Headquarters to update the Policy and Procedures Guidelines.
	Communicate with Nominations and Elections Committee to finalize procedures.
Winter meeting	Convene Fellows Selection Committee and take their recommendations to the next board for approval.
Spring	Transmit names of nominees to NCDA. Convene Eminent Career Award Selection Committee and report winner to Headquarters
June/July	Conduct nominations for elections at the Annual Meeting at the Conference. Chair the Brain Trust Meeting at Conference.

Secretary

The office of secretary is a three-year term. The person may not serve more than two consecutive terms but becomes eligible to serve again after a lapse of one term. The secretary serves as a member of the Board of Directors and as an advisor and record keeper at the Annual Meeting.

The secretary sends a first draft of the minutes of Board of Directors' meetings to the executive director and president for their initial edits. Once that is complete, the minutes are sent out to all members of the Board for correction. The minutes are then corrected according to suggestions received and approved by the Board during its next meeting. Once approved, the minutes are then distributed to committee chairs, website director for posting, and to the executive director for inclusion in the NCDA archives.

The minutes should include all action items, agenda and schedule (beginning and recess of meetings), directives and recommendations, resolutions, work group topics and reports, persons in attendance, issues accompanied by pros and cons, rationale and background information for motions which should be provided by the Board members making the motion. In addition, for each motion, the minutes should show the number of votes in favor, against, abstentions, and recusals, if applicable. When such information is not provided, the secretary may use discretion in adding the information, which is encouraged but not mandated. The minutes should not include personal discussions, or informal discussions. A draft of the minutes should be sent to the Board of Directors for review within 14 days following a Board meeting.

The Secretary also takes minutes at the Annual Meeting and provides to the executive director for the Annual Report the following year.

Calendar

Throughout the Year	Attend Board of Directors meeting, prepare minutes and send draft to board members. Upon approval, submit the final version to Headquarters for archiving and to the editor of the Website for posting.
August/September	In coordination with Headquarters, update Leadership Directory. Work with president and executive director to produce the Annual Report.

Treasurer

The treasurer is elected for a three-year term. The person may not serve more than two consecutive terms but becomes eligible to serve again after a lapse of one term. The treasurer serves as a member of the Board and is an advisor at the Annual Meeting. The treasurer also serves as the Chief Financial Officer of the Association. The treasurer follows accepted procedures for handling the funds of the Association; assists in the preparation of budgets for NCDA, its committees, and publications; and makes recommendations to the board for needed modifications in procedures for managing fiscal affairs. More specifically, the treasurer has the following responsibilities for budget preparation, management, and reporting.

Budget Management

Either separately or through the president's notifications of charges to committee chairpersons, the treasurer informs committees of the amounts budgeted by the board for their operations and informs them of the procedures for obtaining reimbursement and general guidelines for allowable expenses. Except with the specific approval of the president, no other expenditure shall be approved for which funds are not budgeted.

An individual may make necessary expenditures in excess of annual budget allotments to activity accounts only with written approval of the president. Expenditures in excess of annual budget allotments to the total of any major budget classification shall be made only with the approval of the Board of Directors.

Any purchase of supplies or equipment in excess of $500 (five hundred dollars) shall be made on the basis of bids requested from two or more competent vendors. Bids on items that cost less than $500 will be obtained when the nature of such items and good business practices so indicate.

All non-budgeted contracts for services and materials in excess of $5,000 (five thousand dollars) shall require approval by the Board of Directors. Any expenditures from reserve funds shall require the approval of the Board of Directors.

For any new project in excess of $5000, a detailed RFP will be developed and persons interested in completing the work would be asked to submit their proposal bid by a designated date. A selection committee of two or more board members will be identified to review and recommend the best proposal.

All completed vouchers requesting payment or reimbursement are sent to the board liaison person who approves them and sends them to the treasurer for final approval. Check request forms are sent to Board members and committee chairs in the Fall of each year. A check is then sent directly to the payee indicated on the voucher. The NCDA management team produces a monthly financial statement.

A budget line item is established for sending donations/flowers, etc. to or for individuals who have been closely associated with and given significant services to NCDA. This would include memorial donations, flowers or other similar recognitions. These recognitions would be sent at the discretion of the current president up to $100. Any recognition over $100 would need approval of the executive committee.

The treasurer reviews the monthly and annual financial reports.

Fiscal Reporting

Fiscal reporting responsibilities of the treasurer include: routing NCDA financial reports of income and expenses to appropriate officers and trustees, noting unusual conditions and any discrepancies with accounts; preparing (in conjunction with the executive director) financial reports for each board meeting and for the Annual Meeting; advising the Board of Directors regarding the financial condition of NCDA and its potential for undertaking various projects; and making recommendations to the board regarding the investment of reserve funds.

Through a study of income trends and current situations, the treasurer, in consultation with the executive director, prepares an estimate of income and expenses for the next fiscal year for presentation at the October Board Meeting. During August/September the Board sets priorities and a tentative budget allocation for the following year. The treasurer works with the executive director and president to prepare a final budget based on actual requests. In the first board meeting of the new fiscal year, the board meets to approve the final budget.

In addition to maintaining a set of records for the current year, the treasurer in coordination with NCDA Headquarters maintains historic records for use in analyzing income and expense trends. The historic records consist of the following: the pages which show revenue by source and expenses by cost center from the monthly “Summary of Income and Expenses” report provided monthly by the firm responsible for providing NCDA accounting services, to be maintained for the immediately preceding four year period; the full “Summary of Income and Expenses” final report for the previous fiscal year; the audit report for the immediately preceding seven years; and any NCDA memoranda regarding fiscal procedures which the treasurer deems important. The treasurer may add explanatory remarks to any of the documents. The historic records are passed from one treasurer to the next at the end of the fiscal year with the permanent archives housed at NCDA headquarters.

Calendar

September	Assist in preparing an annual budget for the Board to approve.
October	Attend Board of Directors meeting and present the budget. Gain approval and make arrangements with the president for notifying chairpersons of budgets and reimbursement methods.
Monthly	Present the Treasurer’s Report at each board meeting.
January	Review annual audit. Prepare income estimates for presentation to the Board of Directors.
April	Ensure executive director submits audit report for inclusion in the Annual Meeting Report.
June/July	Attend Board of Directors and Annual Meeting; report NCDA’s financial condition.

Trustees

The membership of NCDA elects six individuals to serve as trustees. A trustee is a person, duly elected, to whom the governance of the Association is being entrusted. Engagement and timely attention to responsibilities, including thoughtful review of written material or media prior to engagement and decision-making is expected. Likewise, comprehension of the current Policy & Procedures Manual is expected. There are six trustees, four representing NCDA membership constituency groups (Trustee for School Career Counselors & Specialists, Trustee for Higher Education Career Counselors & Specialists, Trustee for Agency, Business and Industry, & Private Career Counselors & Specialists and Trustee for Counselor Educators & Researchers) one trustee responsible for state divisions, and one at-large trustee, elected by the membership to serve on the Board of Directors. The term of office is three years, with two being elected each year. Trustees may not serve more than two consecutive terms but become eligible to serve again after a lapse of one term.

The Trustee for State Divisions is responsible for maintaining contact with and providing field services to all states divisions. The trustee should be in contact at least quarterly, preferably monthly, with state CDA leadership to communicate NCDA board information, to learn of activities in those states, and to aid the state leaders if appropriate.

Trustees are assigned responsibilities, as liaisons, for various standing and special committees and task forces. It is each trustee's responsibility to maintain contact with the group's leaders. The assigned trustee represents those committees to the Board of Directors. Trustees are responsible for attendance at all meetings of the Board of Directors. Trustees also serve as advisors during the Annual Meeting at the NCDA Conference.

The constituency trustees are responsible for providing advocacy for their constituency to the NCDA Board. Possible activities of the trustees include, but are not limited to:

a. Representation of the constituency to the NCDA Board of Directors
b. Plan and facilitate a constituency meeting during the annual Global Conference
c. Prepare and release a quarterly communique using the specially designed e-bulletin templates through the web editor (see Appendix M)
d. Identify a webinar topic and presenter once annually; work with Headquarters staff to get event scheduled and on the annual calendar
e. Convene a small committee to review and rate related constituency program proposals for the annual conference
f. Identify future trustee candidates for board positions

The role of the trustee-at-large is to facilitate special projects of national scope according to the priorities set forth by the president and/or board and to serve as the liaison for committees and special committee as assigned by the president.

For the 2025-28 term, the trustee-at-large will focus on NCDA's increasing global membership and their specific needs. The ideal candidate will be interested in career development internationally and can advocate for the association on a global scale. This candidate will be intimately involved with the Boards ongoing discussion on how to best guide potential expansion and how to best leverage NCDA resources for this growth.
This candidate may be from outside the US or living within the US possessing the international experience to fulfill the role.

ACA Advisory Council Representative

NCDA is a founding division of the American Counseling Association (ACA) and the ACA Advisory Council Representative is NCDA's representative to ACA. This representative participates in policy formulation and governance of ACA and they communicate the needs and positions of NCDA to the ACA Governing Council. NCDA's representative is responsible for communicating ACA issues and projected actions to the NCDA Board of Directors and Annual Meeting. The ACA Advisory Council representative is a member of the Board of Directors, elected to a three-year term according to the rules established for the election to other offices. Their board tenure runs from July 1 – June 30 in accordance with ACA's fiscal year.

The ACA Advisory Council Representative has a dual responsibility – to NCDA and to ACA. All business of ACA that is of interest to NCDA is to be reported to the president and the Board. This may include matters discussed in executive session of ACA if that matter has the possibility to be of present or future harm or benefit to NCDA. Ideally, the ACA Advisory Council Representative should be a past NCDA president.

Executive Committee

The Executive Committee is chaired by the president and includes the president, president-elect, president-elect-elect, immediate past-president, executive director (*ex officio*). The purpose of the committee is to review matters affecting the Association, and to make recommendations to the NCDA Board of Directors for action. With the permission of the Board and between regular Board meetings, the committee may make decisions with Board approval. The annual budget should be developed by the Executive Committee at its meeting in the fall and should be sent to the entire Board of Directors to enable time for study and comment. The Finance Committee supports NCDA in developing investment and cash flow policies, while overseeing the financial health of the organization.

Finance Committee

The NCDA Finance Committee is Chaired by the NCDA Treasurer, and includes the past president, president, president-elect, and president-elect-elect. Two individuals from the NCDA membership with demonstrated financial and/or investments experience are also included, serving rotating three-year terms. The executive director serves as *ex officio* member.

Sanction and Removal of Directors

Grounds for Sanction or Removal

A. A member of the Board of Directors may be removed from office on any one or more of the following grounds:

1. Repeated failure to perform the duties and responsibilities of a Board Member, including, but not limited to, failure to perform functions mandated by the Bylaws or Policies for the particular office and failure to attend or participate in meetings of the Board.

2. Conduct prejudicial to the best interests of the Association, including, but not limited to,

    a) Fraud in the Association's electoral process;
    b) Failure or refusal to disclose necessary information related to the business of the Association;
    c) Financial improprieties with respect to Association funds or obligations;
    d) Conflicts of interest;
    e) Misrepresentation of the Association and its officers to outside persons;
    f) Conviction of a felony.
    g) Any conduct, whether of commission or omission, tending to bring the Board of Directors or the Association into disrepute or to impair the proper and effective functioning of the Board in the conduct of its business.

The grounds for removal listed in paragraph A.2 may be based upon conduct occurring during the member's present or prior terms of office.

B. The Board, in its discretion, may, by resolution, sanction a member of the Board for any of the conduct described above which the Board deems not to be sufficiently serious to warrant removal from office.

Procedure for Sanction

C. Any member of the Board who has reason to believe that grounds exist for sanctioning another member of the Board may submit to the Board at any regular or special meeting a proposed motion to sanction that member. The proposed motion shall state the grounds for sanction, specifying all

conduct alleged to warrant sanction. Debate on the motion shall take place in an executive session. The presence of the person to whom the sanction motion is directed is not required. If the person to whom the motion is directed is present he/she shall be given an opportunity to speak in his/her defense. The motion to sanction shall require for its approval a simple majority of the Board present and voting, shall be taken by secret ballot, and, if approved, shall be reported in the regular minutes.

Procedure for Removal

D. Any member of the Board who has reason to believe that grounds exist for the removal of another member of the Board may submit to the Executive Committee a proposed motion to remove that member and request that the motion be placed on the agenda for the next scheduled meeting of the Board. The proposed motion shall state the grounds for removal, specifying all conduct alleged to warrant removal or sanction. The Executive Committee shall determine by majority vote whether sufficient reason exists to place the proposed motion, or an amended or modified version of the motion, on the agenda for the next meeting of the Board. The Executive Committee may vote on the matter in person, by telephone, or electronically as it votes on other matters. If the Executive Committee decides to place the proposed motion on the agenda for a meeting of the Board, the Committee shall promptly take steps to provide written notice of the proposed motion by certified mail to the member being charged. The notice shall state the date, time, place and nature of the hearing to be held on the motion, shall include a copy of the motion, including all charges and specifications, and shall direct the member to appear in person at the hearing. Such notice shall be given in sufficient time to provide the member charged at least 30 calendar days prior to the meeting at which the motion is to be considered by the Board.

E. The Executive Committee shall appoint a Case Manager to prepare and present the case for removal to the Board at the hearing.

F. The hearing shall be conducted in accordance with the following procedures:

1. The president of the Association, or another member of the Board designated by the president shall be the Presiding Officer of the hearing. If the president is the person charged, the past-president or that person's designee shall serve as the Presiding Officer. The Presiding Officer shall have full authority and discretion to conduct the hearing in a fair and just manner and to rule on all matters of procedure arising at the hearing, subject, however, to being overruled by majority vote of the Board. The Presiding Officer, the Case Manager, and the accused member shall not be entitled to vote on such procedural questions.
2. The accused member shall have the right to appear at the hearing in person to address the Board and to present witnesses and other evidence in support of his/her case. If the accused member, without reasonable excuse, as determined by the Presiding Officer, fails to appear at the hearing, the hearing may go forward in his/her absence, and the Board may proceed to a decision based on the available evidence.
3. The Presiding Officer shall call the hearing to order, noting that the meeting is in executive session and that the Board is obligated to maintain the secrecy of the proceeding, and shall then read the proposed resolution, verify that the accused has been given notice of the hearing and the charges, announce the names of all Board members present, and inquire of the accused whether he/she is ready to proceed. If the response is negative, the Presiding Officer shall inquire as to the reason the member is not prepared to proceed and shall determine whether the hearing should proceed at that time or be continued to another time.
4. The Presiding Officer shall direct that each charge is read separately, and the accused shall be asked how he/she pleads to that charge, guilty or not guilty.
5. If the accused pleads guilty to all charges, the Board will then proceed to a determination of whether to impose a penalty following a brief statement of the facts and an opportunity by the accused to be heard on the issue of a penalty. The procedures of paragraph F10 shall apply.
6. If the accused pleads not guilty to one or more of the charges, the Presiding Officer shall proceed with the following steps in sequence:
   a. Opening statements, first by the Case Manager, then by the defense.

b. Testimony and other evidence presented, first by the Case Manager, then by the defense.
c. Closing arguments, first by the Case Manager, then by the defense.

7. Cross examination of witnesses shall be permitted. With the permission of the Presiding Officer, and subject to conditions that might be imposed by the Presiding Officer, any member of the Board may ask questions of a witness.
8. Formal rules of evidence shall not apply. The Presiding Officer may exclude evidence that he/she deems to be irrelevant to prove any point at issue, evidence that is unhelpful to a determination of the issues, or evidence that is merely cumulative of evidence already received.
9. Following closing arguments, the Board shall proceed to consider and vote on each of the charges. All members of the Board except the accused shall have the right to vote. The accused and any person who is not a voting member of the NCDA Board must leave the room. The Presiding Officer will then state the question as follows: "The question before the NCDA Board: Is _____ guilty of the charges preferred against him/her?" Each charge shall be read separately, opened to debate, and voted upon separately by secret ballot. The charges can be amended upon motion to conform to the facts adduced at the hearing, but only if the charge as amended is wholly included within the charge upon which the accused was tried. A simple majority vote of those present shall be necessary to find a member guilty of a charge.
10. If the accused is found guilty of one or more charges, the Presiding Officer shall announce that the next item of business is the determination of whether to impose a penalty and the nature of any such penalty. One Board member must make a motion to impose a penalty. The motion is debatable and amendable. All votes shall be taken by secret ballot. A two-thirds majority vote of those present is necessary to remove a member of the Board from office. A simple majority vote of those present is necessary to impose any lesser penalty.
11. After the voting, the accused, if present, will be called back into the meeting room and notified of the results. In any event, the accused will be notified of the results of the vote in writing by certified mail no later than ten days following the close of the hearing.

G. If, after a hearing by the Board in executive session, the member has not been found guilty of any of the charges, there will be no announcement of the charges or the hearing and unless the member who has been charged requests in writing that such an announcement is made. If the member has been removed from the office or otherwise sanctioned, the Board shall have the right to disclose that fact to the membership of the Association.

H. The disposition by the NCDA Board at the hearing shall be final.

IV. MEMBERSHIP CATEGORIES

Career development professionals can join NCDA directly or join through the American Counseling Association. Member benefits are the same for all membership categories:

Professional: NCDA professional members are those members who join through ACA. Professional members hold a Master's degree or higher in counseling or a closely related field, from a college or university recognized by the Council for Higher Education Accreditation. (If you are eligible for professional membership, you may select either professional or regular NCDA membership.) For more information on ACA membership, contact ACA.

Regular: Regular members are those who have an interest or involvement in career development and have a desire to uphold the mission and principles of NCDA. There are no educational requirements for this category. Regular members join through NCDA directly.

Students: Students enrolled in programs preparing them for counseling and other career development areas are eligible to become student members of NCDA. Student members may join through NCDA or through ACA.

New Professional: A career development professional in his/her first year of employment is eligible to become new professional members of NCDA. New Professional members may join through ACA or NCDA directly. In addition, any new person to the Association may take advantage of the New Professional discount for his/her first year.

Retired: Retirees who have been an NCDA member for at least ten years and are retired from the counseling profession can apply for retired membership. Retired members should apply for membership directly through NCDA.

Organizational: Organizational members are a group of members from an institution, company, career center, or other entity wishing consolidated billing. Operational details are included in Appendix J.

Promotional: NCDA is offering a first year of Promotional Membership free to those trainees completing the FCD Course using NCDA's curriculum and taught by an instructor listed on the NCDA FCD Registry and to non-members who have successfully achieved an NCDA Credential. This includes those Alternate Pathways Credential Holders. Non-members are defined as those that have not held NCDA membership in the past; lapsed members are not eligible for free Promotional Membership. (Promotional offerings may be periodically reviewed.)

V. PLANNING AND OPERATION

Strategic Plan

NCDA is a large, complex Association that needs clear goals and continuity of direction to ensure its relevance to its membership and to the public in a rapidly changing social context. A long-range (three-year) plan can provide general direction to the board and provide continuity as leadership changes. The Strategic Plan is intended to give general direction, which will be more clearly defined through the annual plan, annual budget, and annual program of work, which incorporate specific goals for each NCDA standing committee and council. The Strategic Plan should:

1. List NCDA goals.

2. Give priority ratings to each goal. These ratings should guide the allocation of effort and money.

3. Suggest objectives for achieving priority goals.

4. Be reviewed annually and updated no less than every three years through an analysis of future trends and through a survey of NCDA leaders (board, chairpersons, state division presidents, and other career development leaders).

5. Be implemented by the board and chairpersons and posted on the website

6. Be considered as the main priority for expenditure of funds. Other goals should be initiated only after the priority goals as stated in the Strategic Plan have adequately been achieved.

Annual Plan

The Board of Directors under the leadership of the president-elect will develop an NCDA annual plan that is derived from the Long-Range Plan. The plan should include:

1. A list of goals to be achieved during the year.

2. A listing of standing committees and ad hoc groups, which are responsible for each goal.

3. Suggested objectives that might be used by each standing committee and ad hoc group to achieve its assigned goals.

Planning Process

To achieve its long-range and annual plans, the board will request each chairperson and other individuals making budget requests to develop an Annual Program of Work. Once the plan is approved, the board-assigned liaison will help chairpersons complete the following steps:

1. The president will communicate the Annual Plan to the chairperson. The focus will be on the general goal(s) to be achieved, the priority of the goal(s), and objectives for achieving the goal(s).

2. The chairperson shall host a committee meeting at the Conference to begin the process of developing a work plan and budget request for the year.

3. The chairperson will develop a written Program of Work using the suggested format and submit the plan to the president-elect for review.

4. The board will review all Programs of Work reports, will review budget requests and will make changes if necessary to finalize the total NCDA budget. The board will give final approval to all Programs of Work and each liaison will communicate the final Program of Work to each chairperson.

Program of Work Format

The Program of Work should include a title page and work plan. (See Appendix A)

Monitoring/Communication

After reviewing proposed programs of work, the Board will approve the Annual Plan that should direct the work of the Association for the year. The board liaisons are responsible for monitoring the activities of the standing committees and councils. Suggestions for effective coordination include:

1. The board liaison and the chairperson should communicate at least once every month.

2. The chairperson should copy the board liaison on all written communication.

3. The chairperson should feel free to contact the Board liaison at any time to discuss problems or seek direction.

Reporting

Chairpersons are responsible for the following during the year:

1. The Program of Work should be submitted no later than the first month of the fiscal year (October) to the president and appointed board liaison.

2. A summary of achievements should be sent to the appointed board liaison prior to each scheduled board meeting.

3. Upon request, a one-page report should be submitted to the secretary for inclusion in the Annual Report. A copy should be sent to the president and to the board appointed liaison.

VI. NOMINATIONS AND ELECTIONS PROCEDURES

The Nominations and Elections Committee shall include five members; the three most recent past presidents and two members selected at the Annual Meeting. The immediate past president shall serve as chairperson. If any past-president is unable to serve, a former board member will be appointed by the president.

Offices for elections will be open on a rotating basis. Each year, NCDA will seek candidates for the office of president-elect-elect. The positions of Secretary, Treasurer, and ACA Governing Representative Candidates will be sought each third year on a rotating basis and two trustees per year will be sought as outlined below:

Nominations for the positions of president-elect-elect, secretary, treasurer, trustees, and the ACA Governing Representative should be made to the Nominations and Elections Committee using the following timeline which is adjusted annually.

December:	Initial Call for opening board positions set to all Members
January:	Second Reminder Call for opening board positions; all Members
Late January:	Deadline to declare a candidate is running for a board position, no more nominations after this date
February Meeting:	Nomination slate sent to the board for approval
April:	Deadline for nominees to submit materials to the NCDA Headquarters for the Annual Membership Meeting Report (bios, goal statements, and photos)

Ideally, candidates should have the following qualifications:

- President-elect-elect candidates ideally should have served on the board before assuming the president-elect-elect position.
- Secretary candidates should possess strong organizational and listening skills to accurately capture the minutes, action items, motions, and voting.
- Treasurer candidates should have previous financial experience with monitoring a budget, understanding financial reports, and communicating with an auditor.
- ACA Governing Rep will be nominated a full year prior to vacancy. ACA Governing Rep candidates should have served as president and past president before assuming the ACA Governing Rep position; if a past president cannot be identified, the committee may select past board members who have experience working with ACA.
- Constituency Trustee candidates must provide career development services in a work setting that matches the Trustee position, to best advocate for each constituency's needs and services. Trustee positions include representation from 4 main constituencies:
  - School Career Counselors/Specialists
  - Counselor Educators/Researchers
  - Higher Education Career Counselors/Specialists
  - Agency, Business and Industry, or Private Practice Career Counselors and Specialists.
- State Division Trustee candidates must have participated in a chartered NCDA state division, ideally as a president or tenured member of the state board. Knowledge of state division operations is preferred as well and strong teamwork skills to advise NCDA State Divisions.
- Trustee-at-large candidates must possess skill and knowledge if the particular focus set by the NCDA Board. The focus for this position changes for each term and specific criteria will be added to the Application Form.

Any member in good standing may make nominations. Nominees must be members in good standing who have participated in NCDA activities, including the committees, Board of Directors, or other work groups within NCDA.

Each member may only apply for one office each election cycle. The nomination will be in writing to the chairperson of the Nomination Committee (past president) via a completed Nominations Application Form.

The Committee may select up to three potential candidates for each office by screening those that show interest or are nominated by a member in good standing. Serving on the NCDA board is a great honor and the committee should

make every opportunity for those interested members to run for one of the positions. The following should be considered when narrowing the slate to three candidates per office.

NCDA Membership – For the position of the President Elect-Elect and ACA Governing Rep, this person has been an NCDA member for six consecutive years and in good standing. For all other positions on the NCDA board, a member needs to have been a member for two consecutive years and a member in good standing.

NCDA Committee/Task Force – While this is not a requirement, it is highly desirable to have a member who has served in some capacity in NCDA to give them an understanding and insight into the association.

Career/Professional Experience – the member running should be working in the career development field. This may look different for each candidate as one may be in human resources, private practice, a counselor education, research, career or school counselor or any field where they are active in career development.

Volunteer on an Association Board – Members should have served on some type of board before being elected to the NCDA board to give them experience. This does not have to be a Career Development Association board affiliated with NCDA but can be any type of board or association.

Leadership Academy Participation – members of the Leadership Academy may be given preference because of the governance knowledge and project commitment that was made during such participation. The Leadership Academy was intended to build a cadre of qualified members for future succession.

Diversity – NCDA has a long commitment to diversity among its membership and on the board. The expectation, when possible, is to have a percentage of BIPOC members on the board meet or exceed the percentage of BIPOC members of the association. This may be taken into consideration when reviewing applications.

Conflict of Interest – NCDA board members are subject to a Conflict-of-Interest policy. A copy of the policy is listed in the NCDA Policies and Procedures Manual (Appendix I.)

Board Members from Outside of US - For international board members, NCDA will cover airfare to/from the city of US origin to the meeting site. International airfare is the board member(s)' responsibility from his/her home base to the nearest entry city to the US. If an international board member flies directly into a meeting city, airfare will be reimbursed at a rate equal to that of the most expensive domestic airfare rate among the remaining board members.

Nomination Deadline – All members who want to run for an elected position or are nominated need to express interest to the appropriate NCDA contact by the election timeline set annually or they are not eligible to run that election year.

Completed Paperwork and Deadlines – Members who are nominated need to complete all requirements needed to run for the NCDA board. If items are not received, the person may not be eligible to run.

Rubrics for each position have been established to help narrow the slate, at the committee's discretion. The rubrics are located here: Rubrics

Once the Nominations and Elections Committee compiles a slate of three candidates per office, the board will approve the slate at its February Board Meeting.

During the Annual Meeting at the conference, a slate of nominees for each of the open board positions shall be presented to the members.

Each candidate for president-elect-elect is required to give up to a three-minute speech at the Annual Meeting.

After the presentation of all candidates, the members at the Annual Meeting will vote to narrow each office down to just two candidates. Once the runoff vote is confirmed, elections will begin immediately and will remain open through mid-August.

After the conference, online voting will be opened to the rest of the membership. No paper ballots will be mailed. If a member is requesting a paper ballot, the management team will accommodate and validate the ballot using the members' ID number to ensure they are eligible to vote.

No candidate shall perform or endorse campaigning prior to or during the nominations and election procedure. Those parties who do not abide by this policy will be declared ineligible by the Nominations and Elections Committee and their names will be deleted from the ballot.

Appeals: A defeated candidate may petition the Nominations and Elections Committee, which will review the appeal and make recommendations to the Board of Directors.

Procedure for the Election:

The order of candidates will be alphabetical by last name.

At of close of the conference, an electronic e-bulletin will be sent to members in good standing with online voting procedures, biographical information, and goal statement (information used in the Annual Meeting Report). The timing is as follows:

Annual Meeting (June/July)	Narrowing Slate to 2 candidates per office.
Election voting opens	At the conference for those in attendance; immediately after, for general membership
Election Closes	August 15th or 6 weeks after the close of the conference; whichever comes last August 20: Announcement of Election Results
Term Begins	October 1

Online voting will be done through the NCDA membership database and may start immediately after the slate is approved at the Annual Meeting. The executive director will oversee the process. Tallying of the ballots will be automated and reported to the president. The candidates receiving the most votes will be declared the winner. All candidates will be notified prior to the announcement of the election results.

If any questions or disagreements result from the election, the board will use the ACA policies and guidelines to resolve the situation. All violations and appeals will be handled according to ACA policies.

In following ACA guidelines, candidates are prohibited to campaign. The use of personal funds or any kind of informal campaigning, such as dissemination of letters, is not allowed. No funds may be appropriated or accepted by any candidate. No ads or articles about the candidates may be run in any NCDA publication. Oral information about individual candidates is to be confined to personal communications among members, not involving organized campaign speeches, telephone trees, broadcast e-mail messages, web sites and other activities, which may be construed as campaigning. Candidates, friends of candidates, and colleagues of candidates may not distribute or mail campaign literature of any kind. At state or regional meetings, the names of all candidates for an office may be announced and if one or more of the candidates are present, they may be asked to stand and be recognized. They may not speak about their candidacy or as a candidate in front of a group.

VII. ACA CONVENTION

Convention Planning

NCDA shall participate in the annual ACA convention. The ACA Advisory Council Representative shall be responsible for soliciting and selecting the final NCDA sessions offered at the ACA convention.

The following NCDA events may be held at the ACA Convention: NCDA Executive committee meeting, NCDA Social, or NCDA Networking Luncheon. The ACA Advisory Council Representative will be responsible for representing NCDA at all events.

The headquarters staff will assist in submitting ancillary meeting forms to ACA and planning these events in consultation with the ACA Advisory Council Representative and president.

VIII. NCDA'S ANNUAL CONFERENCE AND OTHER CONFERENCES

A conference will be held annually. The president-elect in the year prior to the conference will have overall responsibility for planning the conference including recommendations of future site(s) and development of budgets, with the assistance of the executive director, for Board approval. The president-elect establishes such committees and liaisons as are required to carry out the planning and delivery of the conference. Guidelines for working with other organizations that will support the conference are provided in Appendix B.

1. A conference budget will be prepared by the executive director and approved by the Board of Directors.

2. Professional Development Institutes are held in conjunction with NCDA conferences or at other times in coordination with the Board of Directors. Guidelines are presented in Appendix C.

3. Other planned conferences sponsored by the Association or jointly sponsored with other organizations will be identified in the annual budget. Conferences not identified in the annual budget may be scheduled as requested by the president and approved by the Board of Directors.

4. The NCDA's non-discrimination policy will be posted on the website for all.

5. A task force on conference planning, consisting of the president or designee, president-elect, program chair, and the executive director, will plan all NCDA conferences. The role of the task force shall be to recommend future sites to the Board of Directors, plan the conference, evaluate the conference, and make recommendations for the next conference. The president or designee, with advice and consent of the Board of Directors, shall establish the conference theme, and serve as conference chair. The president may seek the support of the professional development committee in selecting the programs for the conference. The role of the executive director shall be to serve as the conference manager, provide staff assistance to the task force, and make recommendations to the board of directors on future sites.

The following events will be held during the Conference: Board of Directors meeting, Annual Meeting, State/Organizational Leadership Training, Committee Meetings, constituency meetings, and various receptions. The NCDA President may elect to deliver a "State of the Association" address during the Annual Membership Meeting. The president and headquarters staff are responsible for planning these ancillary events including sending ancillary request forms to committee chairs, scheduling meetings, sending invitations to receptions, obtaining awards plaques and certificates, and making social/meals arrangements.

IX. ADVERTISING

All arrangements for advertisements, income producing or not, except for the *Career Development Quarterly,* shall be approved by the executive director. All requests will be made in writing and should include a description of purpose, fees, and fiscal arrangements. The buyer should professionally prepare all advertisements. No advertisement for any product or agency will be considered if the materials or agency mission in any way conflicts with the purpose and/or bylaws of NCDA. NCDA headquarters will coordinate advertising and set rate structure in consultation with the treasurer, and present copy of questionable advertisements to the president for review.

X. NCDA AWARDS, CERTIFICATES, GRANTS, AND SPECIAL FUNDS

Each year, the NCDA Awards Committee, in collaboration with the executive director, and its Board liaison, manages the National Awards Program. This committee is responsible for: (a) establishing an application process and announcing it to the membership via the website and other publications (b) collecting all applications, ensuring they are complete, and disseminating to the committee for consideration; (c) managing the selection process with representation from other committees outlined below for certain awards and/or grants; (d) notify all winners, those not selected, and their nominators; (e) submit list of winners to Headquarters so plaques can be ordered before the conference; (f) submit all winning applications to the Editor of *Career Developments* for the winter issue; (g) recommend updates to the information in the NCDA Policies and Procedures Guidelines for the next year and share with website director for posting. No seated board members or Awards Committee members are eligible to receive any individual NCDA award except for the Presidential Recognition Awards. In addition, an NCDA Committee cannot be nominated for an Award, however, individuals on the committee may be nominated.

Procedures

Responsibilities of Awards Chair/Co-Chair

1. Recommend a budget to the executive director for the upcoming year.
2. Develop committee (as needed) including representation from other committees outlined below.
3. Promote awareness of NCDA awards and grants.
4. Review award or grant applications or nominations with input from committee.
5. Select award or grant.
6. Develop wording to appear on the plaque or certificate.
7. Send a request to the executive director for certificates or plaques.
8. Solicit and coordinate the nomination of NCDA members for ACA awards and other appropriate external awards.

Responsibilities of Board Liaison (in collaboration with Headquarters Staff)

1. Help develop and approve plan of work.
2. Monitor promotion and decision process (including communication to members).
3. Communicate special needs or concerns to staff.
4. Prepare plagues and certificates as specified by the person responsible.
5. Arrange to have plaques and certificates at the appropriate location for the award.
6. Mail plaques and certificates when appropriate.
7. Monitor payments of grant money.

Description of Awards and Certificates

NCDA Awards – all budgeted from the Awards Committee budget unless otherwise stated. Criteria is posted on the NCDA Website.

Award Name	*Committee/Person Responsible*

Those awards managed by the Awards Committee with representation from other committees include (limited to one per year unless otherwise stated):

• Diversity Award	Awards Committee (include DICI rep)
• Fellows (limit of 3)	Fellow subgroup of 3 selected by the president
• Graduate Student Research Award/Grant	Research Committee
• International Practitioner Award	Awards Committee (include GCC rep)
• Legislative Award	Awards Committee (include Gov Relations rep)
• Merit Award	Awards Committee
• Outstanding Service to Intl Students	Awards Committee (include Global Connections rep)
• Outstanding Career Center Awards (2)	Awards Committee
• Outstanding Career Practitioner (4) intended to be 1 per constituency group	Awards Committee
• Outstanding State Divisions (2)	Trustee for State Divisions

The Publications Awards will be selected by:

• Career Convergence Article of the Year	CC Editorial Board
• CDQ Article of the Year	Research Committee
• CD Article of the Year	Career Developments Editorial Board

A special work group of the past 5 recipients will select:

• Eminent Career Award	Eminent Career Award Committee

The Board recognitions, which are not subject to a nominations process, will be handled by Headquarters and include:

- Past President Recognition
- Incoming President Recognition
- Outstanding Board Service Recognition (outgoing members)
- Presidential Recognition (3)

XI. STANDING COMMITTEES, COUNCILS, AD HOC GROUPS, TASK FORCES and ACADEMIES

Committees and special ad hoc groups carry out activities related to membership services and professional action needs. Chairpersons of these committees report to the NCDA Board through a board liaison and provide annual plans, budget requests, progress reports, and other items as requested. Each committee chairperson and committee members must be members in good standing to serve. Each chairperson is responsible for submitting a mid-year and end-of-year report which is posted on the Committee Page. Each report should contain: (a) name of committee/ad hoc group, (b) name of chairperson, (c) purpose, (d) activities completed to date, and (e) goals for the remainder of the year. Committee reports should contain names of the members as well. Reports are to be submitted to the executive director and should not exceed two pages.

Virtual gatherings are a viable option. Committee members or chair travel to the NCDA conference will not be paid unless approved through board vote. In addition, it is not customary for money to be paid for travel to committees or ad hoc meetings. Therefore, requirements for travel, hotel, or per diem money must be spelled out in the plan of work and budget and approved by the Board**.** The duties of committee and ad hoc group chairs and board liaisons are listed below:

Duties of Committee Chairs

1. Constitute a committee and plan for leadership succession using the following procedure.
    a. Determine Primary Committee Co-Chair – more tenured leader who ultimately leads the work of the committee
    b. Select a Secondary Committee Co-Chair – this person will eventually take over upon the departure of the Primary Committee Co-Chair
    c. Select a Co-Chair Elect – this person will follow the Secondary Committee Co-Chair when that person moves up to the primary position.
2. Develop a plan of work and budget. Send to the Treasurer via the Board liaison by the deadline (normally in August).
3. Receive communication from Board liaison as to approval of budget and plan of work by October (after the Board meeting).
4. Carry out work plans. Communicate with the Board liaison monthly as to progress and problems. Report on issues to the liaison that need to be discussed at Board meetings.
5. Write 2 reports annually - a mid-year report due mid-March and a year-end Annual Report by early September.
6. Send reimbursement vouchers to the Treasurer, copying the Board liaison for approval. Copy the Executive Director so payment can be made after approved.
7. Chair committee meeting at convention to discuss plan of work for next year and recruit new members.
8. Coordinate the submission of an article with the editor of the web magazine or quarterly members magazine to communicate relevant activities of your group.
9. Consider hosting a webinar or other NCDA professional development activity – make request through the Board Liaison.
10. Be sure to have consistent co-chairs identified so committee secession stays intact to continue the work.
11. Transfer files and relevant historical records to the person who takes over your responsibilities.

Duties of Board Liaisons

1. Communicate monthly with each committee or ad hoc group chair for which you are the liaison.
2. Receive and review plans of work and budgets and make recommendations to the president-elect.
3. Assist chairs with problems and ideas.
4. Communicate relevant Board decisions as soon as possible after meetings.
5. Review and approve reimbursement vouchers and forward to treasurer.
6. Communicate significant problems to the president between Board meetings.
7. Attend all Board of Director meetings. Report and advocate for your committee and ad hoc groups at Board meetings.
8. Make recommendations to the president-elect for continuation of committee and ad hoc group chairs or nominate replacements.

9. Attend committee and ad hoc meetings at the Conference.
10. Review and approve any committee communications via ebulletin prior to sending them to the web director for distribution (see Appendix M: Electronic Communications).

Appointment of Committee Chairs

The president-elect shall appoint half of all the chairs of standing and ad hoc committees in consultation with the president and executive director subject to confirmation of the appointees by the Board of Directors. Terms of office for all appointees shall be for two years (except as otherwise noted) and shall coincide with the fiscal year of the Association (October 1 – September 30). No member of the Association may serve as Chair of more than one committee or ad hoc group. The Chair must designate the members of her or his committee or ad hoc committee for a term of one year or until the appointment of their successors. Each member of a committee must hold NCDA membership and remain in good standing. Chairs and members may be reappointed.

NCDA Editors and Editorial Boards

Career Development Quarterly Journal

The Career Development Quarterly (CDQ) is the official journal of NCDA. The editor is responsible for editing and preparing four issues of the CDQ per year, preparing an annual report and budget statement for the NCDA Board, and for coordinating business functions of the CDQ with ACA officials including plans for expansion of subscriptions. The CDQ Editorial Board Members are recommended by the editor and approved by the board. They serve two-year terms, with a limit of 3 teams (6 years), with one-third of the members appointed each year. The Editorial Board is responsible for editorial policy and content of the CDQ. The annual subscription fees for the CDQ are set by the publisher, Wiley, and approved by the NCDA Board.

The editor serves a three-year term and may be reappointed for one additional consecutive term. Applications for the position are due by February 1st (typically this would occur in the current editor's second year of a three-year term). . Applications must include vita, sample publications, three letters of reference, a 1-2 page statement discussing the applicant's vision for the CDQ, and a letter of support from the candidate's employer.

The following qualifications are desired in candidates: 1. previous experience as an editor or editorial board member. If the latter, then preferably with the CDQ. 2. Earned doctorate in counseling or a related Field. 3. Membership in NCDA. 4. A vision for CDQ that is consistent with the journal's purpose and mission. 5. Significant publication record. 6. Evidence of strong organizational skills. 7. Employer/Institutional support for serving as editor.

In selecting a new CDQ Editor, a chair of the search committee is selected among the committee, which includes the NCDA Executive Committee, Board Liaison to CDQ, and Chair of the Research Committee. The NCDA President must approve the selection. The chair drafts the Call for Editor Announcement and distributes it to the NCDA *Career Developments*, CDQ, *Career Convergence*, website, ACA Counseling Today, as well as to other application organization's newsletters and websites. The search committee interviews finalists during the annual NCDA Conference and recommendations are made to the NCDA Board. The final Board decision is made at the next board meeting. The board will set an annual honorarium for the editor when setting the annual budget.

Requests for Translation and Reprint of CDQ Articles

NCDA encourages the translation and reprint of CDQ articles. Such requests should be submitted to Wiley for processing. NCDA receives royalties from Wiley annually.

Career Developments Magazine

The NCDA quarterly members magazine, *Career Developments*, is published four times each year to offer members professional development articles and information about Association activities. The magazine editor is an NCDA member appointed to a three-year term by the president and approved by the board. The editor develops a publication schedule and communicates deadlines with associate editors, and communicates themes, deadlines, and other concerns to the board. Generally, deadlines are as follows: June 8 for Fall issue, September 8 for Winter issue, December 8 for Spring issue and March 8 for Summer issue. The board may authorize electronic issues (as opposed to print copy) as applicable.

***Career Convergence* Web Magazine**
NCDA maintains a web magazine entitled *Career Convergence*. The web magazine editor, in coordination with associate editors manages this magazine. The magazine is posted on the NCDA website and is available to the general public. The board will set the annual honoraria for the website magazine editor.

Requests for Reprints of *Career Developments* or *Career Convergence* Articles

1. All material in *Career Convergence* and *Career Developments* is copyrighted. The Legal Notice & Disclaimer is placed visibly on the website. The reprint policy is posted online, including "Please do not reprint without permission."
2. Anyone wanting to reprint an article from either magazine must contact the Editor to request permission. State career development associations do **not** need to contact the editor when reprinting in state newsletters or websites but must still use the citation (below). This is a benefit of chartered associations with NCDA.
3. Reprint permission will be granted to all reasonable requests on a case-by-case basis. The Editor will track permissions.
4. Authors are instructed to refer to their signed Copyright Transfer Form for the details about permitted use.
5. The following statement will be included with all reprints:

"This article originally appeared in NCDA's
(insert either web magazine, Career Convergence at www.ncda.org or in Career Developments),
(add issue date and volume number.)
Copyright National Career Development Association, (month) 20xx. Reprinted with permission."

Standing Committees

Awards Committee
The Awards Committee has responsibility for recommending policy on competitive awards listed in Section X.

Bylaws Committee
The responsibilities of the Bylaws Committee include recommending changes in the bylaws to remove any ambiguity and to improve the functioning of the Association. The committee also monitors changes in the ACA Bylaws and recommends changes in the NCDA Bylaws to make them consistent with those of the parent organization. The Bylaws Committee is responsible for drafting proposals, preparing amendments to the Bylaws, and the final wording of amendments passed by the membership. The committee also carries out other functions as may be assigned to it by the NCDA Board.

Diversity Initiatives and Cultural Inclusion Committee
The Committee on Diversity Initiatives and Cultural Inclusion works to raise awareness and promote equity and access within the membership and leadership of the National Career Development Association (NCDA). We seek to create an inclusive organization where diversity is viewed from an intersectional perspective, acknowledging the ways in which race, ethnicity, socio-economic status, age, gender identity & expression, mental and physical (dis)ability, sexual orientation, religion, and other identity categories exist along axes of power, privilege, and oppression. The committee aims to provide resources and training to educate and empower members regarding best practices related to diversity in career development practice and research and to serve as a hub for diversity conversations and initiatives within NCDA.

Eminent Career Award Committee (1-year term for chair)
This highest award is intended to recognize major contributors and creative leadership in career development. The award (which is not a mandatory annual award) may be presented at the annual NCDA. See Eminent Career Award section for more information.

Ethics Committee
The Ethics committee is responsible for: (a) educating the membership as to the Association's ethical standards; (b) making suggestions to the NCDA Board for the modification or development of ethics-related documents and procedures; (c) responding to questions about ethical standards and the ethical behavior of NCDA members; and (d)

investigating (if called upon by the ACA Ethics Committee or the NCDA Board) complaints of alleged violations of the ethical standards of ACA and NCDA and referring complaints to ACA for adjudication, if necessary.

Global Connections Committee
The Global Connections Committee was formed to unite counselors worldwide who have expressed interest and concern about international policies and practices in career development. The committee achieves this goal by playing an active role in hosting global participants at the NCDA Annual Conference, recognizing global leaders through the International Career Practitioner Award, coordinating collaborating with International Career Development Associations as partners in strategic initiatives, and representing issues of global career counseling practice worldwide through information dissemination and advocacy.

Government Relations Committee
The Government Relations Committee shall be responsible for: (a) sensitizing NCDA members and their colleagues to present and pending school and educational issues that warrant legislative action; (b) promoting, developing, and monitoring federal legislation relevant to career development services; (c) providing state division presidents with information necessary to act locally upon national legislation, appropriations, and related matters; and (d) extending the professional contacts of NCDA/ACA members to persons outside the profession who are equally concerned with legislation affecting career development services.

Graduate Students
The Graduate Student Committee, managed by graduate student members, will provide engagement and professional development opportunities for NCDA's graduate student members. The committee will work on increasing graduate student members, create initiatives geared towards graduate students, and develop programs to help graduate student members increase knowledge on the field of career development.

International Student Services
The NCDA International Student Services Committee aims to increase the understanding of career development experiences and the needs of international students. The committee provides resources and best practice examples to the NCDA members and career development professionals who work with international students in the U.S. Involving a diverse team of dedicated career services practitioners who work with international students on a daily basis, this group advocates for the enhancement of culturally competent career development services, programs and resources that help international students create meaningful career paths in the U.S. and beyond.

Leadership Academy Development Committee
This committee, whose members are selected through an application process rather than self-selected, and whose purpose is to manage the Leadership Academy by establishing or revising policies and procedures, by reviewing applications and selecting participants, by coordinating L.A. training and other activities for the participants, and by communicating with the participants of both the incoming and outgoing classes throughout the year.

Membership Committee
The Membership Committee aims to increase NCDA membership as presented in the NCDA Strategic Plan. The committee is responsible for identifying and activating new methods, ideas and strategies while supporting an infrastructure for the sustainability of new members. The committee will analyze retention data and utilize existent resources to achieve increased response rates for renewal and engagement. They should be familiar with and collaborate with other NCDA work groups to reinforce the entire strategic plan of diversity of membership, leadership, and professional identity.

National Career Development Month Committee
This committee is responsible for coordinating a national kit of materials reflecting the importance of career development as a practical resource for professionals in promoting the concept of career development. Each year the committee, in consultation with the president, recommends a theme for NCD Month as part of the nationwide observance of career development. The committee designs the kit, obtains materials for the kit, coordinates activities with the national poster and poetry contests, disseminates kits nationwide, and assists with the publicity activities at professional Association conventions.

Nominations and Elections Committee (Chair, the immediate past-president, holds a 1-year term)
The Nominations and Elections Committee is chaired by the past president and includes the president, the two most recent past presidents and two persons elected by the members at the Annual Meeting. The committee is responsible for presenting a slate of candidates at the Annual Meeting held during the Conference annually. Nominations and elections will be conducted in accordance with the NCDA Bylaws. View Section VI of this Manual for details.

Research Committee
The Research Committee provides oversight to any research NCDA conducts, is asked to participate in, or awards grants to. Such oversight may include coordination of samples, surveys, etc.; screening research proposals for NCDA grants; suggesting research topics for NCDA members; and identifying career research needs.

The NCDA Research Committee, in order to reach beyond the boundaries of our discipline should annually identify and recognize a high-profile research report and a book that is conducted, developed, and/or produced by individuals and organizations that advance beyond our traditional perspective. The selected report and book should be highlighted on the NCDA website. In addition, the Research Committee may select the outstanding research article from the CDQ each year and award it at the annual conference. The number and scope of the grants will be determined annually by the budget and fundraising efforts.

The Research Committee may also solicit sponsors for the following:

1. $250 Masters level research grant submission
2. $500 Doctorial level research grant submission
3. $1000 Counselor educator research grant submission

NCDA member sponsor donations may be named in the name of an outstanding former or present member of the Association, who in the donor's judgment made a major contribution to the association or the body of knowledge of career development.

In return, the member sponsor will be granted a complimentary NCDA annual membership for the duration of the sponsorship.

Technology
The NCDA Technology Committee provides recommendations to the Board on technology development, concerns and issues relevant to NCDA as an organization and its members. The objectives of the committee are:

- To report to the NCDA organization and Board and provide feedback about technology with distinctions between efficient and effective use
- To assist NCDA in identifying online platforms for members to participate in networking and professional development
- To maintain a database of knowledge experts who conduct training and development on technology in career development
- To develop systems to distribute guidelines and techniques on the use of technology in career development
- To cross-collaborate with other NCDA committees on the integration of technology, as appropriate.
- To establish polices related to NCDA's social media presence.

Veterans
The Veterans Committee was formed in mid-2011 to provide a forum for discussion of veterans' career and employment issues within NCDA. Initial goals of the committee are: 1) To establish a means for NCDA members interested in veterans' issues to communicate with each other; 2) To advise the association on projects related to veterans; 3) To encourage presentations on veterans' issues at the annual conference and other professional development opportunities; 4) To encourage research and publication of articles on career development issues related to veterans; and 5) To provide resources on veterans' issues for NCDA members. The committee has instituted a LinkedIn discussion group.

Special Councils and Commissions

Membership on the NCDA Councils (Publications Development Council and Training and Education Council and Commissions (NCDA Credentialing Commission) requires specialized knowledge. As such, members are to be selected from a pool of qualified applicants. When appropriate, each Chair of the council/commission and /or the NCDA Headquarters staff liaison to the council/commission will send an open call for potential applicants to serve with clear criteria for selection. The council/commission (or a subgroup) will review the applications and make a recommendation to the board via the board liaison. The board will approve the new member(s) during its meeting. This process should aim to allow the new members to attend the council/commission meetings at the annual conference.

The membership should be on a rotating basis with 1/3 of the members coming on and rotating off each year. Each member shall serve for a term of 3 years starting October 1 and ending September 30th. Terms limits are set at 2 three-year terms for all councils and commissions. The board will appoint a board liaison each year.

The chair should be recommended by the council/commission members and approved by the board. The chair should serve for 1-2 years as determined by the members. A chair may repeat a 1-2 year term with the recommendation of the members and approval of the Board. The new incoming chair should plan to meet with the outgoing chair at the annual conference.

The chair of the council/commission will meet with the NCDA Board Liaison and with NCDA headquarters staff at the annual conference or by telephone conference call to ensure open communication and direction.

The council/commission will recommend policy changes to the board for approval. Approved policies will be put in the Policies and Procedures Manual by the NCDA headquarters staff.

Vacancies that occur during a member's term will be filled with an open call for qualified applicants, with council/commission recommendation of an individual(s) to the board for approval.

Specific responsibilities of the various Councils and Commissions include:

Training and Education Council (TEC)
The NCDA Board created the Training and Education Council (TEC) to provide oversight and advisement of NCDA's three training programs including Facilitating Career Development (FCD), Career Practitioner Supervision (CPS) and School Career Development Advisor (SCDA) and any such future training curricula approved by the Board. Their duties will include oversight, advisement, and quality control of the FCD, CPS, and SCDA Training Programs. A TEC board will include representatives knowledgeable in NCDA's Training Programs and continuing educational programming. Policies for the TEC are located online at: TEC Policies.

Credentialing Commission
The Credentialing Commission is formed to serve the public and the career services community by using NCDA standards and ethics for defining roles in the field of career services and recognize those who demonstrate and maintain a high level of professional competency. The NCDA Credentialing Commission Director will direct and implement the work of the Credentialing Commission and is responsible for the oversight, management and supervision of the volunteers serving as Commissioners.

The Credentialing Commission will:

- use NCDA standards and ethics
- become a Commission under Article XI, enabling the NCDA Board to review its charge and function.
- report on its progress and activities regularly to the Board. A Board liaison will report back to the Board frequently.

Specific policies for the Credentialing Commission in included in Appendix H.

Publications Development Council (PDC)

PDC Mission
The Publications Development Council (PDC) develops and publishes books, monographs, and online subscription services. These are generated by diverse, expert voices which offer research- and evidence-based career development practices informed by foundational knowledge and innovation, in consideration of diversity, equity, inclusion, accessibility, and belonging (DEIAB), ethics, and technological advances.

PDC Vision
Career practitioners and scholars are empowered with quality knowledge, skills, and resources that inspire career development globally.

PDC Products
The output of the work of the PDC can be viewed in the Career Resource Store, on the NCDA website at www.ncda.org. These works are not connected to the other NCDA publications (journal, web magazine, and quarterly members' magazine).

PDC Structure and Roles
The PDC consists of 6-8 volunteer members. It is led by co-chairs who work with the NCDA PDC Board Liaison and the NCDA Publications Development Director to identify, deliberate, develop, review and promote publications for sale in the NCDA Career Resource Store. Ad hoc members may be added if needed. *Note, the PDC attempts to ensure every NCDA constituency group has representation on the council.*
Each volunteer is expected to be actively engaged, as follows:

Co-Chairs
- Facilitate council meetings
- Promptly engage in council communications throughout the year
- Send meeting agendas to the council before meetings
- Assign person responsible for Meeting Minutes
- Clarify council action items at each meeting
- Communicate with authors: guidelines/process, timeline, feedback
- Communicate with PDD (Publications Development Director) on a regular basis
- Coordinate with PDD about Author Agreement
- Ensure council and author(s) are collaborating on contractual marketing plan
- Attend NCDA council/committee meetings 2-3 times a year and share PDC activities
- Write and submit mid-year and annual report
- Access materials on the secure webpage
- Be familiar with PDC products
- Provide support/training, as appropriate, for succession

Council Members
- Assist in Identifying Co-Chairs of the PDC
- Participate in council meetings
- Promptly engage in council communications throughout the year
- Review and edit NCDA guidelines for selection of book and monograph publications and subscription services
- Identify and select book and monograph topics; draft "RFP" to solicit proposals
- Review proposals received and select project(s)
- Complete content review assignments in a timely manner
- Develop a publications calendar (aka Publication Plan) and project new release dates
- Access materials on the secure webpage
- Support author(s) with a repository of NCDA marketing strategies, and follow-up with authors to ensure they are implementing their contractual marketing plan
- Provide support/training, as appropriate, for succession
- Be familiar with PDC products
- *(May also engage in "specialist role" tasks. See PCD Ideal Structure below.)*

Specific structure and incentive components for volunteer council members:
- Co-chairs serve a 2-year term, with the option of 2 consecutive terms
- Members serve a 2-year term, which is renewable without limit
  - All members will serve as Content Reviewers (in rotation, as needed)
    - Examines manuscripts for accuracy and audience connection, addresses major gaps, and provides comments/questions that support forward movement
  - Additional PDC member roles:
    - Secretary: Keeps meeting minutes, supports co-chairs managing records and reports.
    - Publication Marketing Specialist: Coordinates collaborations within NCDA in addition to outside organizations
    - Partnership Developer: Coordinates collaborations with organizations outside NCDA
    - Resource Reviewer: Monitors resource purchases and identifies when resources need updating.
    - Subscription Services Manager: Monitors subscription numbers and ensures that subscription services continue to be a valuable product, and identifies new opportunities.

        - Member Relations: Connects PDC to other areas across NCDA and its various membership constituent areas.
- Incentives:
  - $100 credit to be used toward select NCDA offerings of your choice (e.g., membership, PDI attendance, etc.) - annually, after 1 year of service;
  - CE's for service in the PDC;
  - Free access to all NCDA online publications in the Career Resource Store

PDC Member Qualifications

1. **REQUIRED:**
   a. NCDA membership in good standing for at least two years, and continues throughout the time on the PDC
   b. Skills conducive to performing the stated roles, such as
      i. Strong communication, both written and verbal
      ii. Lead, motivate and engage other members
      iii. Timely attention to detail
      iv. Collaborative
      v. Facilitative
   c. Able to commit to two years of service
2. **PREFERRED:**
   a. Interests matching Specialist roles, such as
      i. Review of written word, providing comments on content, as well as minimal editing
      ii. Marketing, such as supporting authors in their outreach
      iii. Note-taking
      iv. Outreach
   b. Ability to attend PDC meeting at annual conference
   c. Diverse experience
      i. Publication development, marketing, ethics, and technology
      ii. DEIAB
      iii. Representing a constituency area not currently on the council

Academies

NCDA has three academies that include the Leadership Academy, Counselor Education Academy, and the Career Teaching Academy. Each are run by volunteer groups led by the Chair and Co-Chair with support of a Board Liaison.

Leadership Academy:

The Leadership Academy was created in 2006 with the goal of identifying and nurturing future generations of NCDA Leaders. Up to eight NCDA members will be selected to join this hands-on, highly experiential leadership development opportunity designed specifically for promising national and state career development association leaders. NCDA's Leadership Academy will refine and strengthen the leadership skills of those selected for this dynamic program. The Leadership Academy Development Committee is responsible for the program and submitting a budget request annually for its activities. See the Leadership Academy Handbook for more information.

Counselor Education Academy:

The Counselor Education Academy (CEA) is focused on enhancing career development training within counselor education professional delivery at colleges and universities higher education programs. NCDA has called for an initiative to improve, enhance, and lead the effort to systematize, for sustainability, career education and development programs in the nation's K-12 schools and the counselor preparation programs nationwide. The intended participants are from the Counselor Education/Researcher Constituency teaching career counselors at the graduate level and will be selected by the CEA organizers annually, based on an application process and includes a budget from the NCDA Board to cover costs during the event. The CEA is normally held as a pre-conference activity before the National Conference. The organizing group must submit a plan and budget for approval prior to the application process beginning.

Career Teaching Academy:

Like the CEA, the Career Teaching Academy (CTA) is focused on enhancing career development training within courses thought at the undergraduate level. This academy is focused on those from the Higher Education Career Counselors/Specialist Constituency who teach undergraduate career planning courses. This academy is for selecting career professionals who are new to or began teaching career planning courses within the last 5 years in a higher education setting. Best practices and progress in career planning course development across the profession will be shared. Like the CEA, the CTA is based on an application process and includes a budget from the NCDA Board to cover costs during the event. The CTA is normally held as a pre-conference activity before the National Conference. The CTA organizing group must submit a plan and budget for approval prior to the application process beginning.

Special Ad Hoc Committees

Brain Trust (Chair, immediate past-president; 1-year term)
This is an ad hoc committee comprised of NCDA past-presidents, eminent career awardees, fellows and past NCDA executive directors. It is chaired by the immediate NCDA past-president and meets at the discretion of the past president at the ACA convention and/or the NCDA conference. The purpose of the group is to provide creative input about trends, needs, and possible NCDA program options to the president and Board. It has no policy-making authority.

Presidential Task Forces (1-year term)
Periodically, the president will convene special committees to address a new constituency or population. A chair is selected based on the work that needs to be done. Depending on the success and need for the committee, it may be eliminated, continue as an ad hoc committee, or promoted to a standing committee the following year.

XII. CONTINUING EDUCATION

NCDA offers continuing education contact hours in a variety of professional development opportunities as outlined in the NCDA Continuing Education Manual. This manual is periodically updated by the Credentialing Commission and is located on the NCDA Website.

XIII. ENDORSEMENTS MADE BY NCDA

NCDA selectively endorses government-produced career development products/materials/programs, which are made available at no cost. An ad hoc committee will review all requests and will submit a recommendation to the Board.

APPENDICES

APPENDIX A

Annual Plan for Standing Committees and Other Workgroups

NATIONAL CAREER DEVELOPMENT ASSOCIATION

October 1 - September 30 is NCDA's fiscal year. Only one proposal per committee permitted. August 15, 2025 is the deadline for requests. Proposals will be evaluated based on planned use of funds and support of NCDA's mission to provide professional development, publications, standards, and advocacy to practitioners and educators who inspire and empower individuals to achieve their career and life goals. Please contact the NCDA Treasurer with any questions.

An online form will be provided annually to all Committees and Workgroups. Please submit the following information online:

Section 1: Demographics
Name of Committee
*
Your Name*
Your Email Address*
Your Phone Number
*
Your Co-Chair's Name
Your Co-Chair's Email Address
Committee Liaison Name*
2025-2026 **Total** Amount Requested by Your Committee (fiscal year begins October 2025)
*
Section 2: -2025-2026 Budget Itemization (fiscal year begins October 20245
Please itemize your budget request. If you have more than 5 line items, please contact Missy Wheeler, NCDA Treasurer (melissa.maw@gmail.com).
Line Item 1 Amount*
Please share a 3-5 sentence explanation and rationale for Line Item 1 amount. Explain how your request aligns with the Strategic Plan.*
Line Item 2 Amount (If $0, type 0)
*
Please share a 3-5 sentence explanation and rationale for Line Item 2 amount (If $0, type N/A). Explain how your request aligns with the Strategic Plan.
*
Line Item 3 Amount (If $0, type 0)*
Please share a 3-5 sentence explanation and rationale for Line Item 3 amount (If $0, type N/A). Explain how your request aligns with the Strategic Plan.
*
Line Item 4 Amount (If $0, type 0)*
Please share a 3-5 sentence explanation and rationale for Line Item 4 amount (If $0, type N/A). Explain how your request aligns with the Strategic Plan.
*
Line Item 5 Amount (If $0, type 0)*
Please share a 3-5 sentence explanation and rationale for Line Item 5 amount (If $0, type N/A). Explain how your request aligns with the Strategic Plan.
*
Section 3: Conclusion
Did you discuss your budget request with your NCDA board committee liaison?
(Committee liaisons listed here: https://ncda.org/aws/NCDA/pt/sp/about_committees)*
Yes
N

APPENDIX B

Guidelines for Co-Sponsoring Organizations for the annual Conference

Organizations can participate as "Co-Sponsoring Organizations" in the annual Conference by contributing an agreed upon combination of the following:

1. Promoting the conference to their members or constituents, through mailings, magazine articles, announcements, etc.
2. Identifying presentations that focus on the organizations' needs and incorporate the conference theme.
3. Organizing a pre-conference workshop within the conference theme targeted to bring their constituents together with other workshop attendees. The organization must assume all financial obligations for the workshop.
4. Organizing an interest section program during the conference to focus on bringing their constituents together with other interested NCDA or conference attendees. Featured speakers may also be chosen and all costs must be assumed by the organization.
5. Sponsoring a hospitality breakfast, lunch, dinner or break or providing other supportive funding.
6. Sponsoring a local field trip or social event.
7. Identifying persons to act as session chairpersons or facilitators, providing persons to help with registration and providing persons to help with other tasks as needed.

In exchange, "Co-sponsoring Organizations" will receive an agreed upon combination of the following benefits:

1. Listing on brochure advertising conference.
2. Listing on the program agenda.
3. Recognition of a representative at a general session, the banquet or at other appropriate time during the conference.
4. Inclusion of one piece of literature or one flyer in the registration packet along with conference agenda.
5. Space for display of materials on a common display table in the exhibit area.
6. Brief description of the "Co-sponsoring Organization" in *Career Developments* and other conference publications
7. Revenue sharing based on the conference budget and sponsor agreement.

Please note: Since NCDA has sole fiscal, planning and implementation responsibilities for the conference, the board of directors will determine the specifics of the budget and revenue sharing each year. While NCDA seeks other organizations interested in various levels of participation, the board of directors reserves the right to approve the conditions of any agreement.

APPENDIX C

Guidelines for NCDA-Sponsored Professional Development Institutes

Providing quality professional development to its members and to other interested professionals is a priority and goal of NCDA. To achieve this goal, NCDA conducts a variety of programs and activities, including workshops or professional development institutes (PDIs) held in conjunction with the NCDA national conference or at other times. Pre-conference PDIs are workshops of various lengths for which contact hours of continuing education credit are granted.

PDI Proposal Criteria and Approval
The PDI plan is set annually by the president and the Program Chair. PDIs may be invited, competitive, or a combination of both. The following criteria are used in the process of selecting PDIs: (1) expressed or identified need for the program, (2) the timeliness, quality and creativity of the proposal, and (3) the qualifications and experience of the presenter(s). Each PDI will have a chair/organizer who may be the sole presenter or one of the presenters for the PDI. To be considered, a complete proposal must be submitted as instructed.

It is assumed that a PDI will, at minimum, be self-supporting financially and will attract at least 25 to 35 participants. It is also assumed that the program organizer and presenter(s) will be registered at the conference at which the PDI is presented.

Duties and Responsibilities
The PDI is organized and administered by NCDA conference staff in collaboration with the PDI chair/organizer, using the following as a guide.
NCDA will:

1. Provide assistance in the development of the PDI agenda.
2. Prepare promotional materials (flyer and ad copy) and publicize the PDI in the NCDA Magazine and other media, as appropriate.
3. Establish deadlines and registration fees. Receive and process registrations. Cancel PDI in the event of insufficient registration (usually 2-3 weeks prior to the conference) and notify presenters and registrants of the cancellation.
4. Arrange for room for the PDI, including AV equipment, site registration, attendance verification, PDI certificate and continuing education credit. This may include an on-site PDI coordinator and volunteer facilitator.
5. Collect registration fees, pay bills, and account for funds.
6. Arrange for evaluation of the PDI, if agreed upon, and feedback shared with presenter.

PDI chair/organizer will:

1. Prepare program proposal as instructed for NCDA approval.
2. Contact presenters and obtain written agreement to participate in the PDI. Obtain audiovisual release, where appropriate. Submit materials to designated conference staff or NCDA executive director.
3. Notify conference staff of equipment and materials needs.
4. Conduct workshop in accordance with approved proposal.
5. If funding is requested, maintain record of approved expenses and submit vouchers and original receipts to NCDA president for approval.

Financial Commitments
PDIs may be funded or revenue shared, depending on the negotiation between the PDI organizers and the selected presenter(s). In some cases, organizations will fully sponsor a PDI's expenses with revenues staying with NCDA. In other cases, NCDA funds the presenter at a limit of $600 per PDI, which can be shared among presenters. In other cases, NCDA revenue shares with presenters with a pre-arranged financial split. Lodging, registration, and other expenses are negotiated annually with each PDI presenter.

Appendix C-2

Guidelines for NCDA-Sponsored Webinars

A webinar is a live online presentation using one's computer to deliver information to participants who are viewing the information and listening to the presenter via an electronic device. Participants are able to submit questions and comments during the presentation. For NCDA's purposes webinars are 1 hour in length. Payment is $600 which may be shared by multiple presenters, if desired. (is hosting by an NCDA committee, the stipend is not offered)

The NCDA Board of Directors is responsible for identifying and recommending quality webinar topics and presenters to the NCDA board. Webinar topics can be based on a) suggestions from an NCDA committee, b) an NCDA member, c) surveys of professional development needs, d) new initiatives in the field of career development, or e) career development experts.

Approximately four webinars are scheduled each year.
To arrange for a webinar, a potential presenter

1. Completes a short proposal form as below and submits it to the NCDA Director of Professional Development for review.

   Title of Webinar
   Name and Title of Presenter:
   Rationale for Topic:
   Relevance to NCDA's Mission and Resources:
   Learning Objectives (3-4):
   General Outline of Content (as detailed as is reasonable):
   Resources/Sources Used:
   Example PowerPoint Slides You Have Developed (2 of your best)
   Listing of 2-3 Previous Webinars You Conducted and for Whom:
   Recording of Any Previous Webinars OR Contact Information of a Person Who Can Recommend You as a Presenter:
   Bio and Photo: One page or less
2. Make any suggested revisions or additions to the proposal as requested by the Board or Professional Development Director.

Once topics are reviewed favorably by the Board and the information is submitted to the NCDA management team, the NCDA management team will:

1. Contact the presenter to negotiate a date and time for the webinar.
2. Prepare an agreement.
3. Announce the webinar to the NCDA members and others through various electronic means.
4. Submit information to the web editor for publication if appropriate and timely.
5. Establish registration options and fees.
6. Work with the presenter to understand the webinar platform
7. Provide assistance and support to attendees and the presenter at the time of the presentation.
8. Record the webinar for future use.
9. Provide evaluation questions to the attendees at the conclusion of the webinar, if appropriate.
10. Compile the evaluation results and submit them to the presenter.
11. Create and send the certificate of attendance to the attendees with the appropriate CE clock hours.
12. Send the recorded webinar to the website director for posting.

APPENDIX D

Annual/Mid-Year Report Template

Please prepare your report and submit electronically to dpenn@ncda.org by (announced date**)**, with a copy to your Board Liaison. These reports will be posted on the NCDA Website.

COMMITTEE/COUNCIL/COMMISSION NAME (in CAPS)
Date of Report

List the Chair and Co-Chair with full contact information and e-mail addresses
List Committee Members (no contact information required)

Activities to Date

- List group activities in brief bulleted statements. Activities should be planned to support NCDA's Strategic Plan. Indicate which goal(s) your activities achieve per the plan.
- This list should reflect progress on projects that were outlined in the Plan of Work submitted last year.

Projected Plan through fiscal year end (September 30th)

- List activities that are not yet finished and the plans for completion.
- This list should also reflect planned progress on projects that were outlined on the Annual Plan of Work last year.

If you received funding for your work, what specific outcome(s) benefited NCDA?

Suggested length: limit to one page

APPENDIX E

Procedure for Submitting Product Development Proposal To NCDA's Publications Development Program for Review

Updated October 2016

NCDA Mission Statement

The National Career Development Association (NCDA) is a division of the American Counseling Association (ACA). The mission states: *The National Career Development Association (NCDA) provides professional development, publications, standards, and advocacy to practitioners and educators who inspire and empower individuals to achieve their career and life goals.*

In an effort to provide products that meet membership needs, the NCDA Publications Development Council (PDC) welcomes proposals from potential authors for new publications that NCDA should consider publishing.

Before Submission

Prior to submitting a proposal, the lead author should contact the PDC Chair to discuss the publishing idea and to learn more about the NCDA publishing process. This informal consultation will save time and resources for the development and later review of the proposal. Following this discussion, the PDC chair will send the author a copy of the Review Sheet used by the PDC in reviewing a Product Development Proposal when it is submitted. A sample of the contract, or Authors Agreement, should also be shared with the lead author. (NCDA will not commit to publishing without a signed Agreement.) The lead author is required to maintain membership with NCDA from proposal through publication.

Procedures:

1. An electronic copy of the proposal should be sent to the NCDA Publications Development Director, Melanie Reinersman <mreinersman@ncda.org>. This will be distributed to the PDC Chair and other members for review.
2. Reviewers return written evaluations (the Review Sheet) to the Publications Development Director within three (3) weeks of receipt.
3. Following a discussion of the proposal by PDC members, a decision will be made to (a) recommend publishing the work as presented, (b) recommend publishing the work after revisions to the proposal are successfully made, or (c) not recommend the proposed work to the NCDA Board.
4. If the proposal is revised by the authors following PDC comments, PDC will make a final recommendation about publishing the work within two weeks of the resubmission.
5. The PDC Chair recommends action to the NCDA Board based on the outcome of the PDC review and further discussion with the author.
6. If the proposal is accepted, the Publications Development Director secures from the author a signed Agreement.
7. PDC will designate two members as consulting editors to work with the authors on the content of the work. The Publications Development Director will continue to serve as an editor and complete the publishing process.

Proposal Format to be submitted by lead author:

1. Title of Publication
2. A 100-word summary of the proposal, to provide a quick overview (similar to what is seen in the online NCDA Career Resource Store)
3. Indicate whether a Monograph or Book:

   Monograph: manuscript is approximately 100 pages double-spaced, 1-inch margin, practitioner oriented and focused on a single topic related to career counseling or career development.

Book: manuscript is a minimum of 175 pages double-spaced and focuses on issues, research, history, or other topics related to career counseling or career development that yields knowledge or understanding.

4. Author(s)
5. Contact Information
6. Author(s) Vita
7. Description of the Intended Audience and Description of the strategies the Author will employ to market the publication
8. Publication Category(ies)

    a) Career Development Theory and Models
    b) Individual/Group Counseling and Facilitation Skills
    c) Assessment
    d) Career Information Resources/Curriculum/Activities
    e) Program Planning/Promotion/Management/Implementation
    f) Coaching/Consultation/Performance Improvement
    g) Specific Populations
    h) Supervision
    i) Ethical/Legal Issues
    j) Research/Evaluation
    k) Technology
    l) Career Planning and Job Seeking Resources

9. Work Setting(s) this would be useful in

    a) K-12
    b) Post-secondary
    c) Non-profit
    d) Government
    e) Business and Industry
    f) Independent/Private Practice
    g) Counseling Education & Research

10. Media Type

a) Print
b) Video
c) CD-ROM
d) DVD
e) Electronic
f) Other

11. Detailed outline of the product or table of contents
12. 400-word summary that describes the materials including the content (e.g., case studies, activities, reflections, etc.) and addresses the items on the PDC Review Sheet for a Product Development Proposal.
13. Examples taken from the reference list (minimum of 10 references) – these references (and the entire manuscript) must adhere to APA style (6th edition)
14. Illustrate evidence of quality and impact by listing items such as previously authored materials, previous editions of the materials, and/or two published works that the reviewers will use to complete the evaluation.
15. Proposed time-line for delivery of manuscript.

Submit Proposals electronically to: Melanie Reinersman, Publications Development Director, mreinersman@ncda.org

APPENDIX F

NCDA Drug-Free Workplace Policy

The National Career Development Association promotes a drug-free workplace. As required by the Drug-Free Workplace Act of 1988, NCDA adopts the following policy:

The applicant certifies that it will or will continue to provide a drug-free workplace by:

1. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the NCDA workplace and specifying the actions that will be taken against employees for violation of such prohibition.
2. Establishing an on-going drug-free awareness program to inform employees about:
    a. the dangers of drug abuse in the workplace.
    b. NCDA's policy of maintaining a drug-free workplace;
    c. any available drug counseling, rehabilitation, and employee assistance programs;
    d. the penalties that may be imposed upon employees or contractors for drug abuse violations occurring in the workplace

Making it a requirement that each employee/contractor to be engaged in the performance of NCDA management services or/and the various cooperative agreements is given a copy of the published statement.

Notifying the employee/contractor in the statement required by paragraph 1 above that, as a condition of employment for NCDA and various cooperative agreements, the employee/contractor will:

1. Abide by the terms of the published statement
2. Notify the executive director in writing of his or her conviction for a violation of a criminal drug statute occurring in the workplace no later than five calendar days under such conviction
3. Notify the NCDA President, in writing, within 10 calendar days after receiving notice of conviction. The NCDA President will then notify the applicable federal agencies with which cooperative agreements are held of such conviction.
4. Taking one of the following actions, within 30 calendar days of receiving notice
    a. Taking appropriate personnel action against such an employee/contractor, up to and including termination, consistent with the requirement of the Rehabilitation Act of 1973, as amended or
    b. Requiring such employee/contractor to participate satisfactorily in a drug abuse assistance or rehabilitation program approved for such purposes by a federal, state, or local health, law enforcement, or other appropriate agency
    c. Making a good faith effort to continue to maintain a drug-free workplace through implementation of the above policies.

This policy is for work that is performed at:

NCDA Headquarters
2468 W New Orleans Street, Suite A
Broken Arrow, OK 74011
918-663-7060

APPENDIX G

Partnerships Evaluation Checklist

On occasion, the National Career Development Association (NCDA) may enter into partnerships with both non-profit and for-profit organizations and related entities. Appendix G is designed to assist NCDA board members in making decisions about which partnerships, if any, to pursue. Any group seeking to partner with NCDA is invited to provide whatever information might be helpful in the evaluation process.

The Process

Any member of the board, committee chair or member, NCDA member, or other external group can bring the initial information on the proposed partnership forward.

For each partnership inquiry, the NCDA President will identify two board members and a third individual with knowledge related to the content/issues associated with the potential partnership to serve as reviewers. These individuals should not be in a position to benefit financially from the potential partnership, be members of, or directly affiliated with the organization.

In their role as reviewers, these individuals will be asked to examine the information on the proposed partnership and complete the Partnerships Evaluation Checklist using the rating scale provided and offering any additional comments they wish to add.

The reviewers will be asked to make a recommendation to the board using the following categories:

- Decline pursuing the partnership
- Table the partnership (current information provided is complete but Board has other priorities at this time)
- Table the partnership and request further information (this may be requested by the reviewers or the board)
- Pursue the partnership and recommend the board's approval. If approved, the board and Headquarters would work out the details with regard to any type of agreement or contract that might be entered into with the partnering organization.

It is possible that no one set of criteria can be established for use in evaluating collaborations with external organizations, but this process may prove helpful for the current and future leadership of NCDA to have some sense of what issues were considered in previous arrangements associated with successful partnerships. NCDA headquarters will maintain a record of discussion topics, rationale, and completed checklists for decisions related to partnerships, in order to further refine these guidelines for future board discussions on this matter.

Approved by the NCDA Board, April 7, 2005.

NCDA Partnership Evaluation Checklist

Criteria	Definitely……Not at All 5 4 3 2 1 0	Cannot determine	Comments
Are the nature of the organization's mission, purpose, or services compatible with the missions and goals of NCDA?			
Are key members of the organization involved in NCDA?			
Does the partnership have the potential to benefit NCDA members (e.g., access to specific services, resources, etc.)			
Does the partnership have the potential to benefit NCDA financially?			
Do the potential benefits (financial or otherwise) justify the impact of the partnership on headquarters staff?			
Does the proposed partnership avoid any potential harm or threat (however defined) to NCDA?			
Does the agreement or partnership avoid an exclusive arrangement with or endorsement of any one organization, e.g., publisher, testing or training organization, etc.?			
Is the timeline for how long the partnership will last specified and information provided on how can it be continued or terminated?			

APPENDIX H
NCDA CREDENTIALING COMMISSION

Mission

To serve the general public and the career services community by using NCDA standards and ethics for defining roles in the field of career services and recognizing those who demonstrate and maintain a high level of professional competency.

Vision

Committed to providing global leadership in competency-based credentialing for career professionals.

Tagline

Commitment | Competency | Certification

Brief History

In August, 2017, NCDA joined other trade associations that uphold standards for their own professions by credentialing people who have the skills to fill specific roles within their field. The NCDA Board of Trustees set up and funded the NCDA Credentialing Commission in 2017. The Commission was charged with making recommendations for implementing credentialing programs for a variety of roles in the career field.

The Commission researched and thoroughly discussed credentialing in its process of creating the initial group of credentials. The Commission has worked in the direction of high standards and streamlined procedures. The word “Credential” was chosen as an umbrella term used for the many types of programs, including licensure, certification, accreditation, recognition designation, and certificates.

The Commission has established six credentials. All these credentials begin with the word “Certified.” All of the credentials contain an assessment component which is scored by “blind reviewers” – experienced professionals who already have the credential and have been trained to score case studies and/or work samples. All credentials are competency-based, requiring the applicant to demonstrate skill and competency in the career development field.

Applications for all of these credentials are completed online, using any available computer. Like all credentials in our field, we DO require continuing education for renewals. Our online process will allow recipients of certificates to update education as it is completed. View the NCDA Credentialing FAQs webpage for more history and details.

About Continuing Education and Processes

Why is Continuing Education Important?

Continuing Education develops your skills, keeps you current in your field, and allows you to deliver quality services.

You must log your continuing education through your Fluid Review account every year. You can find complete instructions when you login to your Fluid Review account https://ncda.fluidreview.com/ .

Annually the NCDA Credentialing Commission will review and recommend approved continuing education offerings.

Guidelines for Continuing Education

All of NCDA Credentials require continuing education. The required 30 contact hours every 3 years must meet the NCDA’s Credentialing Commission’s requirements regarding competency area and activity type, as

described in the NCDA Continuing Education Manual. A contact hour is defined as an hour (60 minutes) spent in learning, development, or delivery in a credential competency area.

Approved Methods of Obtaining Continuing Education Contact Hours

Unless otherwise noted, requirements apply to both remote learning and in-person activities. A **peer** is defined as an individual who works in the same field or occupation and has approximately the same overall level of expertise, training, education or relevant experience as you.

Credentialing Maintenance

Annual Maintenance Fee

Credential holders desiring to keep their credential must pay an annual maintenance fee ($40) and complete credential renewal at the end of three years.

Credential Renewal and Potential Audit

Process for Credential Renewal and Potential Audit

1. Maintain your continuing education contact hours by logging them into the appropriate credential log form. This form will be sent electronically to each credential holder upon their recertification date.
2. The NCDA Credential Commission randomly audits 10% of the completed continuing education logs monthly.
3. If you are selected for an audit, you will receive notification with your $40 invoice for credential renewal that is sent approximately 4 weeks prior to your due date.

4. If you are selected to be audited, your hours will either be considered Acceptable or Unacceptable. Policies to hand both are listed in the Continuing Education Manual

Approval of Continuing Education Providers:

The Director of Credentialing will manage processes and procedures for NCDA Credentialing Commission's Continuing Education providers, including the following:

1. The Director and the Commission Taskforce will review applications. When the group is unsure of an application, they may refer the matter to the Commission for review and decision.
2. The application (and process) will be through the website, with applicants sending completed applications to the Director of Credentialing for processing.
3. The Director will work with NCDA staff for promotion, website maintenance, content, billing, & renewals.
4. The Director will be responsible for developing and maintaining a list of providers, eligibility for annual renewals, and other data the NCDA CC may wish to gather (see requirements below).
5. The billing cycle will be January – December 31 each year and may be prorated for a shorter period. This reduced fee will not be advertised.
6. Application process:
    a. Provider submits an entire completed application electronically as a single file to the Director along with an application fee set by the Commission (this year is $400). The application will be housed in a link on the NCDA CC CE landing page.
    b. If approved, the Director will work with HQ to get the information posted on the website. For renewals, Director and HQ will work together to handle accountability and billing processes.
7. Website provider operations:
    - An organization can be listed on the NCDA Credentialing Commission's Continuing Education Website at an annual fee set by the Commission ($400 this year). This rate may be prorated for organizations coming in the last 6 months of the fiscal year.
    - A provider's listing will be no more than 25 words and can include an organizational description, types of courses available, contact name, email, phone # and link to organization website. The Commission retains the right to edit listing information.
    - A provider will be listed for one year, and, if in good standing, can renew at the end of that period. Good standing refers to the provider having a current credential.

- NCDA CC will disseminate regular e-bulletin to all Credential holders. Content for the e-bulletin will be developed by the Director and disseminated through usual NCDA HQ channels.

8. Requirements for provider approval
    - Provider offerings should be geared toward professionals in the field of career development and should be directly related to competencies listed for an NCDA credential. The competencies can be found on the credentialing website.
    - Provider offerings should increase the participant's skill or knowledge of career development.
    - A CE provider must hold a current NCDA credential.
    - After completion of a course, the provider must provide a certificate of completion to each participant with the contact hours.
    - The NCDA Credentialing Commission reserves the exclusive right to accept or reject a provider to be listed on their website. By identifying providers in the online NCDA Credentialing Commission Continuing Education Listings, NCDA Credentialing Commission does not endorse or approve the course or the course provider's services, nor does NCDA Credentialing Commission make any representation or guarantee concerning the provider or course. NCDA Credentialing Commission disclaims all liability and responsibility for any action or decision made in reliance on the information contained in the listing, or for any actions or inactions of the course provider with respect to any party, or for any related claim, loss or injury. NCDA Credentialing Commission is not responsible for provider compliance with legal requirements related to its business activities or otherwise.
    - With the annual renewal, providers will be asked what courses were offered, NCDA credentials they focused on, and, examples of course evaluation tools.
    - Contact hours: A contact hour is defined as 60 minutes of instruction time. For live events, it excludes opening/closing remarks, introductions, networking functions, coffee breaks, social hours, and meals. For distance courses, instruction time is determined by the amount of time to complete the readings, assignments, and other tasks involved in the distance study course.
    - NCDA CC recommends that all course offerings be barrier free.
    - Providers' applications will be reviewed by the Commission with notification made within 4 weeks of receipt of application.

WEBSITE INFORMATION

This clearinghouse of CE opportunities is presented for your convenience only. Please evaluate any continuing education opportunity against the competencies of your credential.
Credential holders are not limited only to the CE opportunities on this page. See our Continuing Education manual for detailed information. CE opportunities from other sources qualify if they comply with the NCDA Credentialing Commission's guidelines as described in the Commission's Continuing Education Manual.

Information for Consumers

NCDA Credentialing Commission does not endorse or approve the course or the course provider's services, nor does NCDA Credentialing Commission make any representation or guarantee concerning the provider. NCDA Credentialing Commission disclaims all liability and responsibility for any action or decision made in reliance on the information contained in the listing, or for any actions or inactions of the course provider with respect to any party, or for any related claim, loss, or injury. NCDA Credentialing Commission is not responsible for provider compliance with legal requirements related to its business activities, or otherwise.

NCDA Credentialing Commission has not reviewed in detail the content of the listed continuing education courses. All credential holders are responsible for determining whether listed courses satisfy continuing education requirements for any NCDA credentials.

The CE Providers have paid a fee to be listed directly on this website. The list is provided by NCDA Credentialing Commission as an additional service to its credential holders and is not meant as an endorsement of the courses or services these organizations provide.

ALTERNATE PATHWAYS POLICIES

Policy Summary

The integrity and quality of NCDA credentials remains of utmost importance to the NCDA Credentialing Commission (CC). For that reason, pathways under consideration for becoming eligible to meet the criteria for an NCDA credential must meet the rigor, quality, and accountability standards set for any NCDA credential.

Definition of Alternative Pathway:
Each NCDA credential has a clearly defined process in which to qualify to apply for and achieve the credential. An alternative pathway (AP) is parallel process in which an individual can qualify to apply for and achieve an existing NCDA credential.

As is the case with any new credential, the CC may consult with non-Commission stakeholders (e.g. appropriate Training and Education Council representation involvement, SMEs, compliance with NCCA accreditation standards) to be a part of the Advisory Taskforce. Although input is frequently sought from non-Commission entities, the vetting of any alternative pathway lies with the CC and is subject to Board approval.

The operational processes for APs will be as follows:

1. The requestor will be briefed on the process and requirements for applying. The requestor will indicate via the Preliminary Application Form that the requesting organization understands the CC's requirements and fees and will work within these procedures and policies. This form will provide information to the CC and Board for its review of the requestor and initial screening. The requestor must have authorized approval at this stage by the CC and the Board to move forward to the full application process.
2. Each alternative pathway will require a separate form.
3. The Preliminary Application Form will first go to the CC for review and decision. If the CC elects to move forward with a full application, it will inform the Board of that progress.
4. After the approval of the Preliminary Application Form, the CC will ask the requestor to complete the application and pay the application fee. The CC may consult with appropriate non-Commission entities as outlined in its procedures.
5. After study and review by the Advisory Taskforce and/or commissioners, the CC will vote on accepting this pathway for the credential within 1 month of receiving the taskforce/commission recommendation and subsequently, the CC will send its recommendation to the Board, who will vote on accepting the proposed alternative pathway within 1 month of receiving the CC recommendation. It is expected that the entire process may take about 8-12 weeks and potentially several rounds of application improvements and submission.
6. Working with NCDA staff, the Director will finalize contractual operational and quality agreements with the requestor. In addition, the Director will develop and ask for necessary Credentialing website changes to support this alternative pathway.
7. Once an AP is approved, the CC will communicate the associated fees to the AP organization along with its audit procedures. An agreement will be signed by the NCDA President outlining all policies and fees. AP fees will be set annually by the CC, in consultation and approval of the Board. The World Bank 3-tier formula will be used for prorating fees for underdeveloped and emerging countries. For FY 18-19, the fees are as follows:
    a. AP Full Application Fee - $3000 US
    b. Annual Maintenance Fee - $1000 US
    c. Individual Credentialing Application Fees – set at the prevailing NCDA credentialing fees
    d. World Bank Formula for Prorating
        i. Full price for Tier 1 countries
        ii. 40% discount for Tier 2 countries
        iii. 60% discount for Tier 3 countries

PRELIMINARY ALTERNATIVE PATHWAY APPLICATION FORM

The purpose of the form is to inform a requestor about alternative pathway requirements and to provide information for the CC and Board. The requestor should complete the information below:

SECTION 1: Applicant Information
Organization name, address, phone number, website

Contact individual (name, phone, email address)

Description of and legal status of the organization (for profit, non profit)

How will you comply with the NCDA Code of Ethics and ensure that everyone involved will comply with the NCDA Code of Ethics?

Identify existing NCDA Credential for which you are requesting an alternative pathway.

SECTION 2: Target Population and Need

Estimate of anticipated # of credential applicants per year

If this pathway currently qualifies for another credential (either NCDA or non NCDA), provide this information:

- How long has this credential been in existence?
- How many annual applications for this credential?
- Who grants this credential?

Describe how this credential will benefit the professionals/providers and the public,

SECTION 3: Descriptive Information

Alternate Pathways to NCDA Credentials require assessment to confirm the competency of the applicant. Do you plan to utilize the NCDA assessment system (in English)? If not, what is the language of your assessment? Is it available in any other language? If so, identify and outline who will manage the assessment for the AP.

SECTION 4: Alternative Pathway Operations Acknowledgement and Agreement

A requestor must acknowledge and indicate agreement with each of these procedures in order to move forward.

1. NCDA CC reserves the right to name any credential it issues and will own the trademark and logo for any credential that it offers.
2. The NCDA CC will determine representation of this credential on the Commission according to its policy and procedures.
3. NCDA CC will charge a reasonable application and maintenance fee for each credential and will collect that fee. All fees and information will be collected by NCDA CC, payable in US dollars.
4. Only the NCDA CC can generate any credential using its name or brand.
5. All documentation sent to NCDA CC must be in English.
6. NCDA CC will issue the credential in English to successful applicants.
7. All NCDA credential applications must comply with NCDA CC operations and policies and NCDA Code of Ethics.
8. No NCDA Credential will be designed exclusively for one pathway. It is expected that all NCDA Credentials may eventually have alternative pathways.
9. All NCDA Credentials must include an assessment.
10. Credential Applicant and Continuing Education Processes:
    a. Anyone wishing to apply for this credential must upload documentation verifying that the applicant has met the credential training and successfully passed the assessment.
    b. If NCDA accepts CE/CEUs from another organization, that organization must be in compliance with by NCDA's CC continuing education policies.
11. All NCDA Credentials must meet and maintain assessment quality and accountability.
    a. The assessment portion, reviewer qualifications and process, definition of competencies and any other pertinent area of any credential must meet NCDA CC standards.
    b. The assessment portion may be administered by an agency other than NCDA's; however, that agency will be required to provide appropriate documentation and data concerning Sections 3, 4 and 6 on the application to NCDA CC. The assessment will be audited on a regular basis as are all NCDA Credentials.

c. NCDA CC may engage a bilingual neutral individual to review all documents in the non-English language for comparison purposes to the English version provided to NCDA CC. This expense will be borne by the entity offering the non-English assessment.
d. If the assessment portion is administered by another agency and needed by NCDA, a document indicating the applicant has passed the assessment must be provided so it can be uploaded to the NCDA Credentialing portal. NCDA CC will work with that agency for appropriate wording and signatory authority on the document.
e. These items must be approved by the NCDA CC.

APPENDIX I
Conflict of Interest Form

Conflict of Interest

The NCDA Leadership Team (LT), including Board Members, Committee Chairs, Credentialing Commissioners, members of the Training and Education Council and Headquarters Staff, must avoid a conflict of interest with respect to their fiduciary responsibility and their role as a leader of the association. Every effort should be made by LT members to avoid engaging in activities that may result in an appearance of unfair advantage or favoritism. Full transparency surrounding these issues is paramount. Examples of activities that may give the appearance of favoritism include, but are not limited to:

- Being offered an honorarium to speak to an organization as a representative of the NCDA Board while serving on the NCDA board;
- Contracting to write an NCDA monograph and receiving royalties from that contract while on the board;
- Using insider knowledge of conference and institute dates to schedule FCD trainings (and other trainings for credentialing) that bump against those conferences and institutes;
- Receiving an honorarium or expenses paid for offering a PDI that bumps against those conferences and institutes; or
- Applying to NCDA Requests for Proposals while serving on the board.

New Leadership Team (LT) members will be informed of their duty to disclose and will fill out a document outlining any standing issues as they move into a leadership position. This document will include a section wherein the LT member agrees to this policy. As other issues arise, immediate full disclosure to NCDA President and NCDA executive director is expected. Completed forms will be collected by the executive director annually and will be kept on file at the NCDA Headquarters Office.

If anyone has reasonable cause to believe that a member of the Leadership Team (LT) has failed to disclose actual or possible conflicts of interest, the member of interest should be approached directly and privately first and given the opportunity to address the concern. If, after hearing the response, the concern about a failure to report an actual or possible conflict of interest still exists, the concern should be shared with the president. The president shall bring the concern to the Board.

For full transparency, the minutes of the NCDA board must contain the names of the individuals who disclosed or were otherwise found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present, and the board's decision as to whether a conflict of interest in fact existed. In addition, the names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection therewith will also be included in the minutes.

Individuals with potential conflicts of interest must recuse themselves from related discussions, including the board discussions related to possible resolutions. The remaining board will decide if a conflict of interest exists and make recommendations. Possible resolutions may include, but are not limited to;

- A decision of no recommendation (i.e., the conflict of interest is deemed to have minimal potential impact or may have a positive impact on NCDA),
- Recusal from related discussion, debate or decision making,
- Cessation of the issue causing the conflict of interest of appearance thereof, or
- In rare cases, removal from the leadership position

The LT will be asked to sign the Conflict of Interest/Disclosure Statement annually.

Potential Conflict of Interest/Disclosure of Other Interests

As a volunteer leader of the National Career Development Association (NCDA), I recognize that NCDA must provide bias-free governance to NCDA's constituency, and that I owe a duty of loyalty to NCDA. One aspect of fulfilling my duty is to avoid or disclose "other interests" according to the NCDA's policy and procedures on conflicts of interest. I am therefore disclosing the following "other interests" as defined by the NCDA. I will provide further information if requested and will cooperate with any review and evaluation on behalf of the NCDA. I also affirm that I will disclose any and all potential conflicts or advantages or appearance thereof throughout my tenure with NCDA leadership.

1. Any ownership, employment, or volunteer or agency interest or involvement in a commercial entity or nonprofit organization that competes with the NCDA:

2. An ownership, employment, or volunteer or agency interest or involvement in a commercial entity or nonprofit organization that is, or seeks to be, a vendor of products or services to the NCDA:

3. Any position as spokesperson, consultant, employee, or agent for another commercial or nonprofit organization that advances opposing or adverse public policy positions from those of the NCDA:

4. Any known opportunities (e.g., being offered an honorarium to speak on behalf of NCDA, contracting to create a NCDA resource or webinar that might result in personal profit, providing NCDA PDIs and being offered an honorarium or expenses paid, etc.) that might be potential conflict of interest or unfair advantage or perceived by the membership as such:

This information is accurate and complete to the best of my knowledge and ability.

_____ _____

Signature Date

_____

Print Name

_____

Association Position

APPENDIX J

Organizational Membership Policies

Procedure: Organizational membership is offered to any entity seeking consolidated billing. Organizational members will receive the same benefits as individual members. The online and printable forms will be separate from the individual membership forms. Rates for organizational membership will be based on the # of members sought and will be reviewed and updated by the Board along with the other membership categories.

Organizational members will have one central mailing address for all benefits. Each person will have a personal membership record which will allow them to track their continuing education, have access to past receipts, enable them to vote, and allows access to the secured Members Only section of the website. The staff will track data on organizational members the same as we do for individual members and report monthly on the Membership Report. At renewal time, the central contact will receive the notice and will be able to make any name changes at that time, or anytime throughout the year.

Each organizational member will receive an Organizational Member logo with the fiscal year listed. They will be given instructions on its use, which will be limited to their website only. The logo will be updated each year. Each organizational member will be listed on the NCDA Website if requested. Hopefully others will see it and want this privilege as well.

The following will be included on the form:

- Organizational website URL address (allows vetting, if needed, during approval and auditing such as checking the use of the NCDA logo).
- Acknowledge that all members are subject to the NCDA Code of Ethics and agree with the NCDA Mission.
- Acknowledge that all members are aware and agree to NCDA's policy statements and disclaimers listed under the Standards section of the NCDA website and on the bottom of the homepage.
- Approval to list the organization on the NCDA Website as an Organizational Member.

Suggested organizational membership policy/questions for the staff to follow when deciding to accept an organization:

- Does this organization have a strong and obvious relevance to career development?
- Is this organization's mission consistent with NCDA's?
- Will partnering with this organization harm NCDA in any way?
- Have we had previous members from this organization?
- Is the organization's website professional and worthy of displaying the NCDA logo (quality of the organization)?

If the staff is unsure of an organization's match to NCDA, the information will be sent to all presidents for a final decision. If a decision needs further vetting, it will go out to the entire board via e-vote for approval or denial.

Use of the Logo Instructions: This message will be sent to each Organizational Member along with the appropriate annual NCDA Organizational Logo:

Thank you for supporting NCDA as an Organizational Member! The attached NCDA logo may be used on your website only during the time of your active membership to show your support of the association. Additional uses on letterhead, social media, or other organizational materials are prohibited. The use of the NCDA logo does not indicate endorsement of this organization nor is NCDA responsible for the career development services you provide. By posting the logo, the organization agrees to its use only during the times of paid membership. The logo will be removed if membership lapses.

APPENDIX K
NCDA Privacy Statement

The National Career Development Association (NCDA) respects the privacy of its members and other visitors to its Web sites (the “Sites”) or use our mobile applications (each an “App”). The Sites and Apps are collectively the “Services.” NCDA strongly believes that if electronic commerce and online activities are to flourish, consumers must be assured that information provided online is used responsibly and appropriately. To protect online privacy, NCDA has implemented the following policy.

NCDA is located in the United States and these are U.S.-based websites. By using these Sites or the Services, you agree to the data collection, use, disclosure and storage practices described in this privacy policy.

POLICY CHANGES
If there are material changes to our privacy policies, we will notify you by posting the updated policy on our sites, and for registered users, by sending an email. We reserve the right to modify this privacy policy at any time, so please review this page frequently for any changes. Amendments to this privacy policy will be effective when posted. You will be deemed to have been made aware of, will be subject to, and will be deemed to have accepted, the changes to any amended or revised privacy policy by your continued use of our services or the sites.

WHAT INFORMATION DOES NCDA COLLECT?
In some countries, including in the European Economic Area, this information may be considered personal data under applicable data protection laws:
Most data NCDA collects is used only to help us better serve our members. It is our general policy to collect and store only personal information that our members and visitors knowingly provide.

We collect information from you when you choose to provide it to us. This may include when you submit a membership application or otherwise join NCDA, request information from us, register for a conference or other event, purchase a product, create an account with us, sign up for Career Convergence, use our Services, submit a rating or review, participate in a survey or promotion, or otherwise contact us.
The information we collect may include your name, address, email address, telephone number, mobile telephone number, geolocation information, photos, user name and, if you are an NCDA customer or member, credit/debit card number or other financial information.

From General Users. NCDA does not automatically collect any personal information from users browsing its websites. Only aggregate data -- such as the number of hits per page -- are collected. Aggregate data are only used for internal and marketing purposes and do not provide any personally identifying information.

From NCDA's Members, Conference Registrants, and Other Customers. To gain access to members-only resources and personalization features on ncda.org, members and other users are asked to register and provide some limited information. NCDA and its partners may collect IP address and other specific non-personally identifying information for targeted or interest-based communications. This information is submitted voluntarily. NCDA asks users to provide their name, organization name, business phone, and email. Similar information may be submitted to NCDA through membership applications, conference or seminar registration, publication orders, subscriptions, and other relevant mailing. Additionally, for some e-mails sent in HTML format by NCDA to its members through electronic newsletters, NCDA, or our authorized service providers, will collect specific information regarding what the recipient does with that email. For those emails, NCDA will monitor whether a recipient subsequently clicks through to links provided in the message. Other information collected through this tracking feature includes: email address of a user, the date and time of the user’s “click,” a message number, name of the list from which the message was sent, tracking URL number, and destination page. NCDA only uses this information to enhance its products and distribution of those products to its members.

What about Information about Children? Protecting children’s privacy is important to us. We do not direct the Services to, nor do we knowingly collect any personal information from, children under the age of thirteen.

HOW DOES NCDA USE DATA COLLECTED?
NCDA uses information voluntarily submitted by members and other customers in the following ways:

NCDA Member Services and Products. Generally, NCDA and its divisions and affiliates use data collected to improve its own web content; to respond to visitors' interests, needs and preferences; and to develop new products and services.

Disclosures to Third Parties. NCDA also makes member contact information available through the NCDA its online Membership Directory to other members using its websites and to those who register for its conferences. On occasion, NCDA may also provide limited data to third parties that offer products and services. These limited data include names, job titles, companies, business addresses, and email addresses, but do not include business phone or fax numbers. Users may contact NCDA at info@ncda.org or 918-663-7060 to express their preferences if they determine later that they do not wish to have the information shared. Please include "Web Privacy Policy Question or Comment" in the subject line.

Credit Card Account Information. When members and customers choose to pay using their credit cards, NCDA submits the information needed to obtain payment to the appropriate third-party payment vendors for the limited purpose of processing your payment. NCDA does not otherwise disclose your credit card information.

Compliance with Law. We may provide access to your information, including personal information, when legally required to do so, to cooperate with legal proceedings, to protect against misuse or unauthorized use of our websites, to limit our legal liability and protect our rights or to protect the rights, property or safety of visitors of these websites or the public.

DATA STORAGE AND RETENTION
Your personal information is stored on servers in the United States. You understand and agree that NCDA may collect, use, disclose, and otherwise process the information you provide as described in this Privacy Policy even if you are from an area outside the United States. Your personal information may be disclosed in response to inquiries or requests from government authorities or to respond to judicial process in the United States. We will retain your personal information for as long as it is needed to provide you with the Services, or to fulfill any legal or contractual obligations we may have.

If you are a resident of the EEA: Your personal information will be transferred to and processed in the United States, which has data protection laws that are different than those in your country and may not be as protective. For more information on where and how long your personal data is stored, and for more information on your rights of erasure and portability, please contact NCDA at info@ncda.org.

HOW DOES NCDA USE COOKIES AND PIXEL TAGS?
For more information on our use of cookies, click **here**.

Cookies. Cookies are files that contain information created by a web server that can be stored on a user's hard disk for use either during a particular session ("per-session" cookie) or for future use ("persistent" cookie). NCDA and its partners may use cookies to facilitate automated activity, assist you with storing and tracking your passwords, determine appropriate solicitations, and review navigation patterns. Cookies are not used to disseminate personally identifiable information about Users over the Internet or to analyze any information that Users have knowingly or unknowingly provided. Users may instruct their Internet browsers to opt out of accepting a "persistent" cookie and rather accept only a "per-session" cookie, but will need to login each time they visit the sites to enjoy the full benefits. If the user declines the attachment of any cookie, the user may not have access to the full benefits of the websites. Registration enables the sites to better determine users' interest areas and provide the most relevant information.

Pixel Tags. We also use "pixel tags" (sometimes called "Internet tags," "web beacons," or "clear GIFS"), which are tiny graphic images, on our websites. Pixel tags help us analyze our visitors' online behavior and measure the effectiveness of our websites and our advertising. We work with service providers that help us track, collect, and analyze this information. Pixel tags on our websites may be used to collect information about your visit, including the pages you view, the features you use, the links you click, and other actions you take in connection with the websites. This information may include your IP address, your browser type, your operating system, date and time information, and other technical information about your computer or device.

Pixel tags and cookies in our emails may be used to track your interactions with those messages, such as when you receive, open, or click a link in an email message from us.
We also work with business partners that use tracking technologies to deliver advertisements on our behalf across the Internet. These companies may collect information about your visits to our websites, and your interaction with our advertising and other communications.

WHAT PRIVACY ISSUES ARISE WITH LINKS TO OTHER SITES?
These websites contain links to other websites. NCDA has no control over and is not responsible for the privacy policies or content of such sites. In addition, our privacy practices may differ from those of these other sites. If you provide personal information at one of those sites, you are subject to the privacy policy of the operator of that site, not the NCDA's privacy policy. Please make sure you understand the other site's privacy policy before providing personal information.

YOUR RIGHTS AS A VISITOR FROM THE EUROPEAN ECONOMIC AREA (EEA)
If you are a European resident, our legal basis for collecting and using your personal data or information is to do so with your consent; where we need the personal data or information for performance of a contract, or where the collection and use is in our legitimate interests and not overridden by your data protection interests or fundamental rights and freedoms. In some cases, we may also have a legal obligation to collect the personal information in question. If we collected your personal data or information with your consent, you may withdraw your consent at any time.

You also have the right to:

- Access your personal data or information;
- Delete, or request deletion of, your personal data or information;
- Object to or restrict processing of your personal information;
- Request portability of your personal information;
- Complain to your local data protection authority at any time;
- Object to automated decision making; and
- Update your personal data or information.
- To withdraw consent or exercise these rights, please contact: info@ncda.org
- Adjust your preferences through the NCDA website.
- Withdrawing your consent will not affect the lawfulness of any processing we conducted prior to your withdrawal, nor will it affect processing of your personal information conducted in reliance on lawful processing grounds other than consent.

If we ask you to provide personal data to us to comply with a legal requirement or enter into a contract, we will inform you of this and let you know whether providing us with your personal data is required and if not, the consequences of not sharing your personal data with us.
Similarly, if we collect and use your personal information in reliance on our or a third party's legitimate interests and those interests are not already listed above (see "Information Use" section), we will let you know what those legitimate interests are.

WHAT MEANS OF REDRESS ARE AVAILABLE?

If any user suspects NCDA has handled its personal information in a manner that does not comply with this privacy statement, please contact us by e-mailing to info@ncda.org or call 918-663-7060. Please include "Web Privacy Policy Question or Comment" in the subject line.
For residents of the EEA, with questions, concerns or requests relating to your personal information, you may contact NCDA at info@ncda.org. (May 28, 2018)

APPENDIX L

NCDA Current Events Policy

Request to the NCDA to Release Statement about Current Events

Periodically, NCDA is faced with a current national/international event which may require a response. Responses are approved by the NCDA Board of Directors and released to the membership and/or public on behalf of the association. Because of the complex nature of responses, based on whatever current event is happening, NCDA's Board is mindful to keep the association apolitical. As a 501 C-3 non-profit, NCDA is a non-partisan organization and should avoid any position that may be political in nature. "The NCDA" is the elected officers of the organization, and all responses should be made on behalf of the mission, vision, and policy statements of the NCDA as agreed to by the membership.

The NCDA Board accepts recommendations from its members and national committees/work groups. To make a request, please prepare an email attachment addressed to the NCDA Board and send to the executive director, The Board will address the request either at its next scheduled meeting, or in the case of a more urgent matter, at its e-vote special meeting called by the NCDA President.

The request must include:

1. NCDA member ID or Committee making the recommendation
2. Explanation of the problem/challenge
3. Explanation of how the problem/challenge related to the NCDA Mission and affect NCDA's members
4. Rationale on why NCDA should support or put out a statement
5. Possible solution to the challenge (what NCDA resources would be helpful, should a webinar be scheduled to discuss, what policy changes may need to be made, etc.)

Internal Policy:

The executive director receives the request. If not complete, it will be returned with instructions on how to resubmit per the outline above.

The executive director will inform the president and a decision will be made on whether to act immediately or at the next board meeting. We will be mindful of the need for responses in a timely manner.

The NCDA Board will discuss and vote on the recommendation. The president or executive director will report back to the requestor.

A Statement will be prepared if approved and disseminated. Rejected recommendations will be returned to the requestor with rationale on the decision.

As needed, the executive director will contact ACA to see what action they may be taking.

APPENDIX M

Electronic Communications Procedures

Definitions:
NCDA headquarters manages electronic communications (referred to as e-bulletins) to members and non-members (e.g., prospective, promotional members; lapsed members; interested parties as appropriate). The NCDA database of contacts (referred to as database) includes email addresses provided by the contact and can be queried by staff for sending e-bulletins to select groups.

Regularly scheduled e-bulletins include:

- Career Convergence web magazine, sent to everyone in the database on the first of the month;
- Members-only Announcements, sent the second week of the month, no later than the 15th;
- Conference or Credentialing Announcements, sent the third week of the month, or as needed.

Sporadically sent e-bulletins may include (but are not limited to):

- Membership renewal messages
- Credentialing maintenance messages
- Opportunities for participation in events, research, honors, etc.

Responsibilities:
NCDA headquarter staff coordinates the timing, layout, and dissemination of e-bulletins. The text of the message must be generated by the sender, per the instructions below, although some e-bulletins are written by staff. Messages must be approved by an NCDA Board member, executive director, and/or website director. Repetition of e-bulletin messages is discouraged, so as to not "flood" the inbox of contacts or cause an increase in "Unsubscribe" or blocked messages. Members are responsible for maintaining their current email address on file with NCDA.

Generating E-bulletin Messages – based on groups listed below:

Constituencies
All NCDA Constituency groups have a specially designed e-bulletin template, which can be sent to anyone in the NCDA database who has selected the given constituency in their profile (only one may be selected). The Board Trustee is responsible for preparing a quarterly communique and submitting it to the web editor at least one full week in advance of the preferred e-bulletin sending date. Options for including images or pdfs should be discussed with the website director. Additional messages to constituencies may occur, based on upcoming events, research needs, or another targeted message.

Committees, Councils, Commissions
Chairpersons of NCDA committees, councils and commissions may request e-bulletins to anyone in the NCDA database as needed. Once the Board liaison has approved the message, the chairperson may contact the website director to discuss distribution at least one full week in advance of the preferred e-bulletin sending date. Options for including images or pdfs should be discussed with the website director.

State Leaders
State career development association (cda) leaders do not send e-bulletins, but rather they are one of the groups that may be the recipients of e-bulletins. The NCDA Trustee for States will send e-bulletins to leaders, often regarding upcoming meetings, due dates, and options to apply for grants, awards, etc.
State cda events are not announced via e-bulletin, although inclusion in the Members-only Announcements e-bulletin is possible. State cdas are encouraged to submit events for posting on the NCDA Calendar on the home page of the website, per the instructions below:

Please submit the following to webeditor@ncda.org as soon as the state event details are set:

1. Name of event (including subtitles; e.g. "Minnesota CDA Fall Event: Generational Differences")
2. Dates / Times
3. Location
4. Link for more info
5. Optional: description – a short, text-only paragraph is fine, especially if there is something specific to highlight (e.g. if your keynote speaker is the NCDA President); do not attach a pdf or other document;

most often the event name is self-explanatory and the link will provide the best info so this description is not necessary.

Other Groups
Other groups that may request e-bulletins include, but are not limited to, Leadership Academy participants, publications' staff, related associations, etc. These requests can be submitted to the appropriate Board Trustee, Board liaison, or staff in addition to the website director. Any researcher must follow the policy set by the NCDA Research Committee (described elsewhere in this manual and on the website, under Committees).

Deadlines
The deadline to submit messages for inclusion in the monthly Members-only Announcements is the first of each month. Submit only short paragraphs (with appropriate links for more information) to webeditor@ncda.org. Scheduling and deadlines of other messages depend on the completeness of the submission, the e-bulletin queue, and work schedule of the staff.

Queue and Statistics
The e-bulletin queue should not be overloaded, to avoid “flooding” the inbox of contacts, causing an increase in “Unsubscribe” or blocked messages. A record of the queue is maintained and can be reviewed by staff to identify what message was sent on which date and to which contacts.

Each e-bulletin generates statistics including:

- the total number of messages sent
- the number of confirmed open messages
- the links in the message that were clicked, specifically:
  - the date/time each link was clicked
  - the name of the contact who clicked the link*
- the number of undeliverable messages
  - the name and email address of the intended recipients
  - the apparent reason why the email was rejected

APPENDIX N

Management Team Evaluation Process

Name _____Date _____

Please evaluate the company according to the following guidelines and rating scale.

Please be aware that evaluations will be kept in strictest confidence by the Board. Individuals' feedback will be aggregated and summarized by the president. A summary of themes will be shared with the company and the Board. Specific comments will not be attributed to any individual. If there isn't sufficient information about the company's performance, please mark N/A. In reflecting on the executive director's performance, consider her/his overall performance in that category rather than focusing on isolated incidents. Focus on broad themes and patterns of consistent behavior including her/his strengths, contributions to the organization, and challenges/areas that you would suggest for improvement or development. For every rating, please use specific examples to support that rating. when possible.

Ratings:
4-Exemplery: Truly exemplary or demonstrated special achievements.
3--Outstanding: Exceed requirements and expectations. Consistently exhibits exceptional performance in terms of quality and quantity of work.
2—Effective: Consistently fulfills requirements in terms of quantity and quality of work. Meets or slightly exceeds expectations.
1—Needs Improvement: Performance is less than expected in terms of quality and/or quantity. Specific recommendations for improvement should be made.

Responsibility	Description	Rating
I. Fiscal and Business Management	• Process publication orders, magazine ad orders, and mailing list orders. • Process new and renewal memberships. Complete emailed database update from ACA and identify state and national leaders. • Process conference, CPI, webinar, and PDI registrations. • Process FCD Registry new applications and renewals. • Process accounts payable, bank deposits and credit card payments. • Complete bank reconciliation monthly, collect accounts receivable and calculate and pay withholding and state sales tax. • Manage Second Century donations and expenses. • Complete financial statements on a monthly basis, and 990 Federal tax return filing annually. • Work with auditor to complete annual audit. • File other appropriate reports such as state and local reports. • Answer phone calls, respond to emails and correspondence. • Maintain and update vendor database.	
II. Management of Staff and Contracted Services	• Hire and supervise staff, manage contracted services, oversee special project coordinators as required to provide management services. • Secure a technology firm to monitor upgrades for website, database, technology and services.	

		• Coordinate FCD Advisory Council; distribute FCD materials including Student Text and Instructor Manual Curriculum. • Maintain FCD Registry of Instructors and Programs database. • Maintain and update the FCD section on the NCDA website on an ongoing basis. • Establish an ongoing relationship with a local auditing firm – audit is required each year to maintain non-profit status. • Establish a procedure for the annual elections; manage the process. • Maintain contract for Journal Publication (editing, printing and distribution – current through ACA). • Maintain contract for Journal Subscription and Advertising (processing and promotion – currently at ACA). • Maintain Insurance Policy on behalf of NCDA for inventory. Also maintain Insurance Policy (currently through ACA) for Professional Liability and D&O for the Board. • Maintain vendor to support NCDA Credentialing initiative. • Support the Career Supervisor Training Project with TEC. • Support the School Career Development Training Program with TEC. • Support the redesign of the NCDA website each 5 years of at the discretion of the board.	
III.	Management of Membership Services and Records	• Send renewal and new member e-bulletins • Continue to manage the Need Career Help Directory on the website using Credential Holders Only • Revise membership brochure, renewal notices, and membership letters on an annual basis. • Managing credentialing application and renewal process	
IV.	Conference Management	• Provide conference management support using the Conference Timeline. • Process and handle all conference registrations, prepare conference registration receipts. and name tags. Collect conference fees and process refunds. • Respond to phone, email and fax requests for conference information. • Provide on-site support during conference. • File continuing education forms and respond to requests for information. • Oversee the planning of two regional institutes. • Oversee book sales at the conference. • Oversee ancillary programming including Supervision Training, CE Academy, LA Academy, and other miscellaneous extra meetings.	
V.	Meeting Support and	• Coordinate webinars and podcast with support from the Board	

	Professional Development	• Maintain collaborations and partnerships with CERIC. And other partners. • Coordinate operations of the Approved CE Provider Program with the Credentialing Commission • Coordinate administrative functions for mentoring program	
VI.	Customer Service	• Maintain staff liaison to support the activities of the Publications Development Council. • Process requests for copyright release, make royalty payments, and manage contracts for book reprints. • Maintain contract with fulfillment company for dissemination of NCDA products. • Oversee the work of the third-party publication vendor by monitoring and managing print and e-publishing options for NCDA publications. Continue to provide accounting support for all publications/curriculum sales. • Edit and produce new publications including copyright, ISBN #s, and Library of Congress pre-publication information. • Develop and print marketing brochures. • Monitor sales of NCDA products. • Implement marketing plans to advertise NCDA products via website, journal advertising, magazine advertising, and conference exhibits.	
VII.	Interpersonal Relationships	• Respond to member inquiries and requests. • Disseminate information to public, press and media. • Assist with development and management of grants and other funding opportunities. • Develop linkages with other associations. • Maintain positive relationship with NCDA's Advocacy Firm in DC.	
VIII.	Credentialing Management	Funding is provided to oversee a Director of Credentialing and administrative support staff to support this initiative. Maintain a Director Position and provide administrative support of the program set forth by the Credentialing Commission. Oversee agreement with the vendor providing support for the application/assessment process.	

APPENDIX O
Travel Policy

(last updated October 2025)

The travel policies outlined in this document were created with the financial health of the organization in mind.

Airline Tickets: Utilizing Routespring (when possible), log in to book your economy airline tickets at least 60-days in advance of travel, using the logistics information provided by Headquarters. The cost will be billed to NCDA. Board members are reminded to review the ticket fare prior to booking. While Routespring does allow users to book upgrades, NCDA will reimburse economy tickets. Individuals who do not book airline tickets 60-days in advance are reminded to book airline tickets at least 20 days in advance to avoid higher airline fees.

Hotel Reservations: NCDA will make hotel reservations in advance and post the charges to a master account. NCDA will also provide information on reimbursable costs, location, etc. Board members will be responsible for incidental charges only. If you require additional nights at the hotel outside of the details listed on the logistics page or need to make changes to your reservation, please contact the staff. The additional costs will be your responsibility. NCDA will cover the cost of lodging for the dates outlined on the logistics page.

Per Diem: NCDA will provide a Travel Template for your use to submit per diem and other expenses for reimbursement. The form must be completed within 60 days of the end of the meeting. The Travel Template is always available on the NCDA Board Page. Per diem is reimbursed at $88 per day for participants of NCDA's activities and This amount is divided into $17.00 for breakfast, $27.00 for lunch and $44.00 for dinner. Participants must submit for the allowable meals, based in the travel itinerary. **No receipts are required for meals.** When a meal is provided by NCDA, participants should not submit for the per diem for that meal.

Rental Cars: NCDA does NOT reimburse the cost of rental cars, unless it is financially beneficial due to the location of travel. If you decide to rent a car, you will be responsible for the charges. If transportation is a challenge, please seek advance approval from the Treasurer before renting a car.

Airport Transportation: The cost of roundtrip shuttle transportation is reimbursable through NCDA. In advance of the travel, NCDA will provide information on shuttle costs and allowable expenses on the logistics form.

Mileage: NCDA does reimburse roundtrip mileage from the participant's home to the airport. The rate is based on the prevailing IRS mileage rate and is set at the beginning of NCDA's fiscal year. If a participant is driving to the event, reimbursement may be submitted for the mileage up to the cost of a roundtrip ticket, whichever is cheaper.

Parking: Parking fees at the home airport and parking fees for participants who drive are allowable charges. Please submit receipts with the travel form.

Miscellaneous Charges: Other charges directly related to the cost of the travel are reimbursable. Charges such as tips, copies, tolls, etc. would be covered under this section. Baggage fees are allowable expenses and must include purchase receipts submitted with the reimbursement form.

International Board Members: NCDA will reimburse airfare using the policies outlined for US-based Board members. International Board Members are expected to book travel 60 days in advance.