



Membership & Committee Handbook

The standard procedures in this handbook are not contractual commitments by SDPA, and members shall not construe them as such.

The procedures are intended to be guidelines to members and committees and are merely descriptive of suggested procedures to be followed. SDPA reserves the right to revoke, change or supplement guidelines at any time without notice.

Each standard procedure is subject to and incorporated herein under the Bylaws of the South Dakota Paralegal Association, which may be found at:
<http://www.sdparalegals.com/Membership/Bylaws/bylaws.html>.

On behalf of the SDPA Executive Committee, we thank you for your consideration and assistance in following the standard procedures provided in this handbook.

Please contact the current President if you have any questions or need further assistance with any listed procedure or other issue.

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Our Organization

Introduction to SDPA

Welcome Letter

Welcome to **SDPA**! We are pleased to have you with us and hope that you find your new membership or committee position rewarding and challenging. **SDPA** is a growing nonprofit organization, and we feel that all of us have the opportunity to benefit. We want to maintain the benefits of our legal profession as we expand and grow with the organization over the coming years.

To reach our goal we must provide superior service to our members and community. As a member of the **SDPA** team, you are critical to our success. Through your success we can reach our goals.

SDPA strives to create an exciting, challenging and rewarding networking opportunity that allows you to flourish. As a dynamic organization, we offer many career opportunities. We want you to build a long and successful association with **SDPA** and be a happy and productive member of our team. Through your dedication, creativity, perseverance and efforts, our organization will continue to grow.

Once again, welcome to **SDPA** and our best wishes for success. We appreciate your confidence in our future. Let's grow together.

Regards,

SDPA Executive Committee

Association History

The South Dakota Paralegal Association (SDPA) is a non-profit organization established in 1989. We are an association committed to the preservation and continued growth of the paralegal profession. We are affiliated with the National Association of Legal Assistants (NALA).

Association Goals

The purpose of the South Dakota Paralegal Association (SDPA) is:

- To establish good fellowship among association members, NALA and members of the legal community.
- To encourage a high order of ethical and professional attainment.
- To further education among members of the profession.
- To cooperate with The South Dakota Bar Association.
- To support and carry out programs, purposes, aims and goals of NALA.

Right to Change or Discontinue

The policies and procedures in this handbook are not contractual commitments by SDPA, but are intended to be guides to membership and committee action and merely descriptive of suggested procedures to be followed.

SDPA reserves the right to revoke, change, or supplement the handbook guidelines at any time without notice. Such changes shall be effective immediately upon approval by the Executive Committee.

Recruitment

SDPA aggressively recruits to attract new members, including student members and to provide opportunities to members who volunteer and are sometimes nominated for executive level positions. Association committee positions may be filled by either simply volunteering or by nomination. Each year the nomination committee gathers information and nominates members for the upcoming year that will fulfill the open positions on the Executive Committee. The nominations will be submitted to the current Executive Committee for review and posted in the newsletter prior to the Annual meeting. The Executive Committee is appointed by membership vote during the annual meeting each year. Recruitment may be conducted through member relationships, schools, referrals and professional networking. Committee positions are appointed by the President. The President and Executive Committee should consider the most appropriate method of recruitment for filling committee positions. All recruitment shall be conducted in an ethical, professional and non-discriminatory manner.

Association Dues and Assessments

The dues of this association shall be payable by January 1 of each year. Upon failure of a member to pay their dues by March 1, the membership shall be deemed delinquent and upon failure to pay dues by April 1, the membership will be terminated.

Dues of new members shall be prorated as follows, according to the date of application for membership:

- January 1 through March 31: 100% of the annual membership dues
- April 1 through June 31: 75% of the annual membership dues
- July 1 through September 30: 50% of the annual membership dues
- October 1 through December 31: 25% of the annual membership dues

In addition to the membership dues, a one-time fee shall be charged to the member upon application for membership in the Association. Any member whose membership has lapsed because of nonpayment of dues shall be required to pay the initiation fee upon application to rejoin the association.

Grievance Procedure

SDPA recognizes the value of a grievance procedure that provides for the timely review of membership grievances in a fair yet workable manner. A grievance is considered to be any dispute between a member and the association which impacts on membership.

Although purely personal matters between members would not ordinarily give rise to a grievance subject to this grievance procedure, any matter that adversely affects a member's ability to perform his or her obligation as a member of SDPA or committee task could be the subject of a grievance. Use good individual judgment and common sense as your guide.

A member may express a verbal grievance to his or her President or member of the Executive Committee. If the concern is not resolved to the member's satisfaction within one week, the member may put in writing the details of his or her grievance and submit the grievance to the President.

The President will appoint a person to decide the matter, and who will review the written statement. The problem will be discussed with the Executive Committee. Final resolution of the grievance will be made by the appointed person and discussed with the member. The decision will be reduced to writing, a copy given to the member and filed within the record for a period of five (5) years, with the original kept in the President files.

Lunch Coordinators

A "Lunch Coordinator" is a volunteer member who agrees to organize a luncheon each month (or quarter) in a specific area of South Dakota for members of SDPA. The purpose is to share information, education and network. The lunch sessions are not intended as SDPA corporate meetings.

Luncheons may be utilized to network and educate. The lunch coordinator is allowed to contact potential speakers and submit an application to the President for approval by NALA for CLE credit during the luncheon period. The CLE credit is subject to approval by NALA. Attendees who are non-members are allowed to attend the CLE sessions at no cost for up to three (3) visits. After the third visit, the lunch coordinator is to offer a membership opportunity to the attendee. If the attendee is not

interested in membership after attending a CLE lunch session three (3) times, the lunch coordinator is allowed to charge a fee of \$10.00 for the session. The lunch coordinator is responsible to submit the fee amount paid to the Treasurer. This procedure is to be followed in each area wherein a lunch coordinator is approved by SDPA. Although SDPA welcomes guests and potential members, the CLE sessions during the lunch period time are offered as a benefit to members of SDPA.

Library

For a fee, the library provides seminar DVDs for paralegals to check out if they are not able to attend a seminar so they may still receive CLE credits. Fees are: \$35/DVD for members, and \$50/DVD for non-members, plus postage. Other library materials are available for no charge other than postage costs.

Confidentiality of SDPA Information

It is the responsibility of all SDPA members to safeguard sensitive association information.

In consideration of their membership with SDPA, members will be exposed to information and materials which are confidential and proprietary and of vital importance to the economic well-being of the organization and its members. Members will not at any time disclose or use, either during or subsequent to their membership, any information, knowledge or data which they receive or develop during their membership which is considered proprietary by SDPA or which relates to the trade secrets of the company. Such information, knowledge or data includes the following which is by example only: processes, know-how, designs, drawings, diagrams, formulas, test data, accounting or financial data, business plans and strategies, negotiations and contracts, research, vendor lists, and discoveries.

Upon termination of their membership with SDPA they must promptly return any and all documents containing the above information, knowledge or data, or anything relating thereto, to the organization or particular committee of the organization.

Upon termination of a committee appointment, they must promptly return any and all documents containing the above information, including but not limited to committee boxes, CDs and equipment.

Group Mailing - Electronic Transmission

Electronic transmission to members or group mailing by "email" correspondence is to be treated in a confidential and professional manner by all concerned. The Executive Committee must assure thorough, consistent and evenhanded electronic mailing procedures to protect the privacy of members and confidential information. This policy and its administration will be implemented in accordance with the SDPA Bylaws.

Any group mailing to SDPA members by electronic correspondence shall be submitted to the Executive Committee for review and approved by the President prior to mailing. The President and/or a member of the Executive Committee will handle group announcements to members. The chair of the newsletter committee will submit a draft of the newsletter prior to group production of an electronic version of the newsletter. The suggested procedure to send a group email is as follows:

1. Submit to the President for review;
2. President submit to the Executive Committee for review and approval; and
3. Once approved, either the President or an assigned committee member send the group email to

members provided that they send the email to their own email address and list member addresses under the blind copy to protect the addresses of the recipients (members).

All members are expected to use good judgment in using electronic mail and to avoid indiscretions such as offensive or inappropriate messages or any other message, organization deems inappropriate. E-mail messages should be used for business and not for soliciting outside business ventures or other matters unrelated to the SDPA's affairs.

Violation — Any group email sent to members without approval will be subject to review by the Executive Committee.

SDPA Logo

The SDPA logo is not to be used for personal use. The logo is a trademark logo of the SDPA. Any member of the SDPA who finds a purpose to use the logo must obtain written approval prior to any correspondence, electronic correspondence, marketing or any purpose thereof including the SDPA logo, from the President of SDPA, who in turn will obtain approval by majority of the Executive Committee.

Member Privacy

SDPA recognizes our Members' rights to privacy. In achieving this goal, the organization adopts these basic principles:

1. The collection of member information will be limited to that which the association needs for business and legal purposes;
2. The confidentiality of all personal information in our records will be protected;
3. All committee members involved in record keeping will be required to adhere to these policies and practices. Violations of this policy will result in disciplinary action;
4. Internal access to member records will be limited to those committee members having an authorized, business-related, need-to-know basis;
5. The organization will refuse to release personal information to outside sources without the member's written approval, unless legally required to do so;
6. Members are permitted to see the personal information maintained about them in the association records. They may correct inaccurate factual information or submit written comments in disagreement with any material contained in their membership records.

Mail and Shipping

From time to time, members shall be permitted to utilize the SDPA mailbox. Ship to the SDPA mailing address as follows: Peterson Law, c/o Cindy Schmit, ACP, Peterson Law Office, P.O. Box 1888, Sioux Falls, SD 57101-1888. Any costs associated with shipments by members on behalf of an approved SDPA project shall be charged back to SDPA and shall be promptly reimbursed to the member by the treasurer.