

TO THE POINT

Unit Resources



**Council for
Exceptional
Children**

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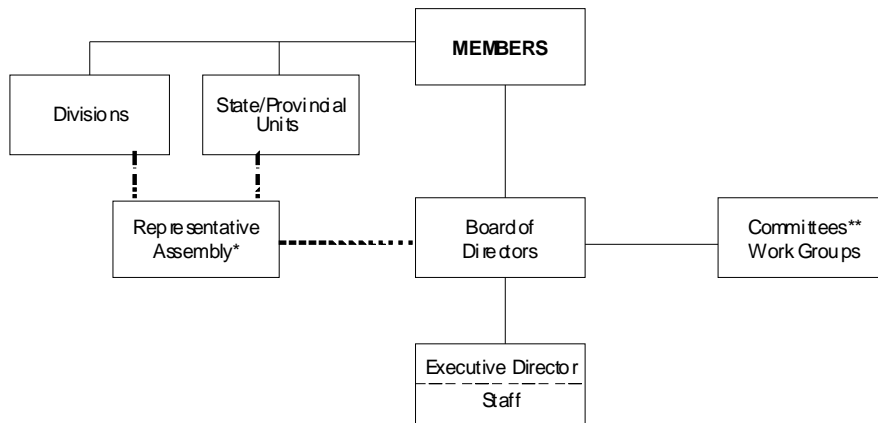
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5.01 COUNCIL FOR EXCEPTIONAL CHILDREN GOVERNANCE STRUCTURE



CEC Governance Structure



* The Representative Assembly (RA) is comprised of two representatives from each State/Provincial Unit and Division. There are also two representatives elected by Student members. The President and President Elect are voting members of the RA; other Board members are non-voting members of the RA.

————— Responsible to
 - - - - - Representation
 - - - - - Advises and consults with

**Canadian/U.S., Diversity, Elections, Finance and Audit, Honors, Nominations, Professional Standards and Practice, Students.

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5.02 CEC CORE VALUES, MISSION, AND VISION

CORE VALUES

CEC values:

- The dignity and worth of all individuals.
- Social justice, inclusiveness, and diversity.
- Professional excellence, integrity, and accountability.
- Rich and meaningful participation in society for all individuals with exceptionalities.
- Effective individualized education for all individuals with exceptionalities.
- The importance of families in the lives and education of all individuals with exceptionalities.
- Collaboration and community building to improve outcomes.

MISSION

CEC is an international community of educators who are the voice and vision of special and gifted education. Our mission is to improve the quality of life for individuals with exceptionalities and their families worldwide through professional excellence and advocacy.

VISION

CEC is a diverse, vibrant professional community working together and with others to ensure that individuals with exceptionalities are valued and included in all aspects of life. CEC is a trusted voice in shaping education policy and practice and is globally renowned for its expertise and leadership. CEC is one of the world's premiere education organizations.

ADOPTED BY THE CEC BOARD OF DIRECTORS, FEBRUARY 5, 2008

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5.03 CEC CODE OF ETHICS

We declare the following principles to be the Code of Ethics for educators of persons with exceptionalities. Members of the special education profession are responsible for upholding and advancing these principles. Members of the Council for Exceptional Children agree to judge and be judged by them in accordance with the spirit and provisions of this Code.

Special Education Professionals...

- are committed to developing the highest educational and quality of life potential of individuals with exceptionalities;
- promote and maintain a high level of competence and integrity in practicing their profession;
- engage in professional activities which benefit individuals with exceptionalities, their families, other colleagues, students, or research subjects;
- exercise objective professional judgment in the practice of their profession;
- strive to advance their knowledge and skills regarding the education of individuals with exceptionalities;
- work within the standards and policies of their profession;
- seek to uphold and improve where necessary the laws, regulations, and policies governing the delivery of special education and related services and the practice of their profession;
- do not condone nor participate in unethical or illegal acts, nor violate professional standards adopted by the Delegate Assembly of CEC.

ADOPTED BY THE CEC DELEGATE ASSEMBLY, APRIL 1983

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5.04 CEC TERMINOLOGY

Ad Hoc Committee - A committee that is formed for a specific purpose with a life-span of one year unless otherwise designated.

Board of Directors (BOD) - The administrative, general legislative, and policy making body of the Council.

CEC - The Council for Exceptional Children, a professional organization of more than 35,000 persons interested in the education of individuals with exceptionalities.

CEC Today - CEC newsletter. Provides news and information on issues, events, and topics of interest to members.

Chapter - An organized group of members within a state or province which has been officially recognized by the state or province.

Charter - A document issued to a Council unit (state/provincial unit or division) after the unit has presented evidence of meeting the minimum membership, program, and organizational requirements established by CEC for two consecutive years.

Division - A Council special interest unit that meets the Council's membership, program, and organizational requirements. There are 17 divisions: **CASE**—Council of Administrators of Special Education; **CCBD**—Council for Children with Behavioral Disorders; **CEC-DR**—Division for Research; **CEC-PD**—Pioneers Division; **CEDS**—Council for Educational Diagnostic Services; **DADD**—Division on Autism and Developmental Disabilities; **DCDD**—Division for Communicative Disabilities and Deafness; **DCDT**—Division on Career Development and Transition; **DDEL**—Division for Culturally and Linguistically Diverse Exceptional Learners; **DEC**—Division for Early Childhood; **DISES**—Division of International Special Education and Services;

DLD—Division for Learning Disabilities; **DPHMD**—Division for Physical, Health and Multiple Disabilities; **DVI**—Division on Visual Impairments; **TAG**—The Association for the Gifted; **TAM**—Technology and Media Division; and **TED**—Teacher Education Division.

Exceptional Children (EC) – CEC's journal of original research on the education and development of children with exceptionalities.

Fiscal Year – The fiscal year for CEC is January 1-December 1. Units determine their own fiscal year. This is the period for which budgets are made, etc. It usually coincides with the term of office.

Headquarters - The building and staff at 1110 N. Glebe Road, Suite 300, Arlington, VA 22201-5704, voice 800/224-6830, TTY 866/915-5000, fax 703/715-8412.

Membership Categories – Premier (person who contributes additional support to the Council's activities); Professional (individuals actively engaged in professional work related to or interested in the education of children and youth with exceptionalities); Student (a person enrolled in the Council who is a full-time student during the academic year as defined by an accredited college or university; or a person enrolled in the Council who is a part-time student not engaged in full-time employment as a certified professional in the field of education); and Associate (parents or family members of an individual with an exceptionality whose primary vocation is not in the field of education, paraprofessionals, and the general public).

Nominations Committee – The committee which nominates members of the Board of Directors and plans, coordinates, and develops various leadership and mentoring opportunities for the Council.

Representative – The state or provincial unit, division, or student member elected to represent that unit or students in the Representative Assembly.

Unit - A state or provincial unit or division of the Council.

Representative Assembly – The advising body of the Council which also has the responsibility of electing members of the Nominations Committee and taking action on amendments and policy changes that affect the privileges of units.

Sponsor – An individual CEC member or unit which makes a financial contribution (in one of the sponsorship categories identified by the Council) toward special projects that help to achieve the goals of CEC.

Standing Committee - A committee, usually discussed in the unit bylaws, which continues, year after year.

State/Provincial Unit - An organization of all CEC members (premier, professional, student, and associate) within a state or province.

Subdivision - An organized group of division members within a state or province which has been officially recognized by its international division.

TEACHING Exceptional Children (TEC) – CEC’s journal featuring articles of a practical nature to teach and administer programs for children with disabilities and/or who are gifted.

Term of Office – The term served by CEC officers is January 1-December 31. Units determine their own term of office. This is the administrative term served by officers. It usually coincides with the fiscal year.

Unified Membership - In order to be a member of any state or provincial unit, chapter, international division, or subdivision, one must first be a member of CEC. Additionally, in the case of subdivisions, one must first be a member of both CEC and that division.

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5.05 CEC HISTORY

- 1922 The International Council for the Education of Exceptional Children is organized by a group of administrators and supervisors attending the summer session at Teachers College, Columbia University, and their faculty members on August 10, 1922. The Council begins with 12 members. Elizabeth E. Farrell was the Founder and first President, 1922-26.
- 1923 First annual meeting held in Cleveland, Ohio.
- 1942 Journal of Exceptional Children (renamed Exceptional Children in 1951) becomes property of CEC.
- 1947 Constitution amended to provide for establishment of federations.
- 1953 Constitution revised to provide for divisions.
- 1958 CEC renamed The Council for Exceptional Children. Committee on Canadian Affairs established, later called the CEC Canadian Committee (1968), then the Canadian Council for Exceptional Children (1979).
- 1963 J.E. Wallace Wallin Special Education Lifetime Achievement Award established; first awarded to Harley Z. Wooden (1964).
- 1964 CEC Outstanding Public Service Award initiated.
- 1966 CEC receives U.S. Office of Education grant to operate the ERIC Clearinghouse on Exceptional Children.
- 1968-69 TEACHING Exceptional Children initiated.
- 1972 CEC celebrates 50th Anniversary at the 1972 Convention in Washington, DC.
- 1975 The Education For All Handicapped Children Act (Public Law 94-142) is passed. CEC was the principal force in bringing to the U.S. Congress the need for such a law and building the support for its passage.
- 1978 CEC's First World Congress on Future Special Education convenes at the University of Stirling in Stirling, Scotland, with over 2,000 participants from 39 countries.
- 1980 Delegate Assembly authorized divisions to organize and operate subdivisions.
- 1983 CEC adopts Code of Ethics, Standards for Professional Practice, Standards for the Preparation of Special Education Personnel, and Standards for Entry into Professional Practice.
- 1984 Clarissa Hug Teacher of the Year Award established; first awarded to Mary-Dean Barringer (1985).

- 1988 CEC Outstanding Leadership Award established; first awarded to June B. Jordan and Kenneth E. Wyatt (1989).
- 1989 CEC Delegate Assembly adopts policy framework for CEC Standards for Entry Into Professional Practice. CEC Special Education Research Award established; first awarded to Melvyn I. Semmel (1991).
- 1992 CEC adopts the Common Core of Knowledge and Skills Essential for All Beginning Special Education Teachers. CEC Business Award established; first awarded to Labert Machine Products Company, Somerville, New Jersey (1993).
- 1994 CEC Today newsletter premiered at the CEC Annual Convention in Denver, Colorado.
- 1995 *What Every Special Educator Must Know: The International Standards for Preparation and Certification of Special Education Teachers* is published.
- 1997 CEC celebrates 75th Anniversary at the 1997 convention in Salt Lake City, Utah.
- 2000 CEC released report on special education teaching conditions, “Bright Futures,” which received national media attention. CEC adopted new governance structure: a Board of Directors, elected by the membership; and a Representative Assembly.
- 2001 First member-wide election for CEC officers.
- 2002 CEC celebrates 80th Anniversary at the 2002 Convention in New York, New York.
- 2003 CEC produces policy stating that all students with disabilities should be included in assessment and accountability systems.
- 2004 CEC helps guide Congress in the reauthorization of the Individuals with Disabilities Education Act (IDEA) 2004. The National Council for the Accreditation of Teacher Educators (NCATE) implements CEC’s Performance Standards.
- 2005 CEC calls for all members to advocate for the Javits Gifted Program and IDEA funding.
- 2008 CEC Board of Directors adopts new Core Values, Mission, and Vision.
- 2009 CEC achieves a significant victory in its long time quest for full funding of IDEA; Congress passes and President Obama signs the American Recovery and Reinvestment Act, which includes an historic increase in IDEA funding creating unprecedented opportunities in the field of special education.

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5.06 CEC DIVISIONS

Take advantage of this special opportunity to increase your knowledge and become more deeply involved in your profession. CEC has seventeen divisions, each focusing on a particular exceptionality or interest in special education. The divisions publish journals, newsletters, books and monographs; sponsor conferences, workshops and other professional development activities; have organized Children's Action Networks to facilitate political action; and provide unique networking opportunities not available anywhere else. Only CEC members are eligible to join the divisions. A brief description of each division follows.

If you're interested in...

...Program administration

The Council of Administrators of Special Education (CASE) promotes professional leadership and provides special education administrators with opportunities for personal and professional advancement. Members receive the Journal of Special Education Leadership and the CASE newsletter.

...Behavioral and emotional disorders

The Council for Children with Behavioral Disorders (CCBD) promotes the education and welfare of children and youth with behavioral and emotional disorders. Members receive Behavioral Disorders, Beyond Behavior magazine, and the CCBD newsletter.

...Research

The Division for Research (CEC-DR) is devoted to the advancement of research related to the education of individuals with disabilities and/or who are gifted. Members receive the Journal of Special Education, Current Practice Alerts, and the CEC-DR newsletter.

...Long-term and retired members of CEC

The CEC Pioneers Division (CEC-PD) supports CEC's programs and activities. Membership in CEC-PD is open only to persons who have been members of CEC for 20 years or more, life, or retired members. Members receive the CEC-PD newsletter and may receive the CEC-PD Membership Directory upon request.

...Diagnostic and prescriptive services

The Council for Educational Diagnostic Services (CEDS) ensures the highest quality of diagnostic and prescriptive procedures involved in the education of individuals with disabilities and/or who are gifted. Members receive Assessment for Effective Intervention and the CEDS newsletter.

...Cognitive disabilities/mental retardation, autism

The Division on Autism and Developmental Disabilities (DADD) supports the education and welfare of individuals with cognitive disabilities/mental retardation, autism, and related disabilities. Members receive Education and Training in Developmental Disabilities, Focus on Autism and Other Developmental Disabilities, and the DADD newsletter.

...Communicative disabilities, deafness, or hard of hearing

The Division for Communicative Disabilities and Deafness (DCDD) focuses on improving the education of children with communicative disabilities or who are deaf or hard of hearing. Members receive Communication Disorders Quarterly and the DCDD newsletter.

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...Career development and transition to adult life

The Division on Career Development and Transition (DCDT) focuses on the career development of individuals with disabilities and/or who are gifted and their transition from school to adult life. Members receive Career Development for Exceptional Individuals and the DCDT newsletter.

...Cultural and linguistic diversity

The Division for Culturally and Linguistically Diverse Exceptional Learners (DDEL) advances educational opportunities for culturally and linguistically diverse learners with disabilities and/or who are gifted, their families, and the professionals who serve them. Members receive Multiple Voices for Ethnically Diverse Exceptional Learners and the DDEL newsletter.

...Early childhood

The Division for Early Childhood (DEC) is an organization designed for individuals who work with or on behalf of children with special needs, birth through age 8, and their families. Members receive the Journal of Early Intervention (Professional and Student members only), Young Exceptional Children magazine, and the DEC newsletter.

...International programs

The Division of International Special Education and Services (DISES) focuses on special education programs and services in other countries. Members receive the Journal of International Special Needs Education and the DISES newsletter.

...Learning disabilities

The Division for Learning Disabilities (DLD) works to improve services, research and legislation for individuals with learning disabilities. Members receive Learning Disabilities Research and Practice, Current Practice Alerts, and the DLD newsletter.

...Physical, health and multiple disabilities

The Division for Physical, Health and Multiple Disabilities (DPHMD) advocates for quality education for individuals with physical disabilities, multiple disabilities, and special health care needs served in schools, hospitals, or home settings. Members receive Physical Disabilities: Education and Related Services and the DPHD newsletter.

...Visual impairments

The Division on Visual Impairments (DVI) advances the education of children and youth who have visual impairments that impede their educational progress. Members receive the DVI newsletter.

...Gifted and talented

The Association for the Gifted (TAG) delivers information to both professionals and parents about gifted and talented children and their needs. Members receive the Journal for the Education of the Gifted and the TAG newsletter.

...Technology and media

The Technology and Media Division (TAM) addresses the need, availability and effective use of technology and media for individuals with disabilities and/or who are gifted. Members receive the Journal of Special Education Technology and the TAM newsletter.

...Teacher education

The Teacher Education Division (TED) emphasizes the preparation and continuing professional development of effective professionals in special education and related service fields. Members receive Teacher Education and Special Education and the online TED newsletter.

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5.07 CEC AWARDS FOR INDIVIDUALS AND ORGANIZATIONS

A summary of CEC's awards for individuals and/or organizations is listed below. Typically, the deadline for applying for CEC's awards is in October. For more information about the specific criteria and requirements, nomination procedures, deadlines, etc., contact CEC as listed below.

J.E. Wallace Wallin Special Education Lifetime Achievement Award

The J.E. Wallace Wallin Special Education Lifetime Achievement Award honors an individual who has made continued and sustained contributions to the education of children and youth with disabilities in areas such as publications; research; development of new concepts, approaches or programs; and practical application of improved teaching devices. This award was named for and begun with the assistance of Dr. Wallin, a pioneer in the development of clinical psychology and special education in the United States.

Clarissa Hug Teacher of the Year Award

The Clarissa Hug Teacher of the Year Award recognizes a CEC member who currently provides direct services to students with exceptionalities. The Clarissa Hug Teacher of the Year is an outstanding member of the profession whose work exemplifies the best of special education teaching. His or her work reflects significant educational success for students, continued professional development, and the highest standards of educational quality.

CEC Outstanding Leadership Award

The CEC Outstanding Leadership Award recognizes a CEC member who has been a driving force in the organization, resulting in the Council's being recognized for its commitment, leadership, and dedication to service for students with exceptionalities. This award honors a member who has made significant contributions to the Council's programs at the local, state/provincial, national, and/or international level over an extended period of time.

CEC Special Education Research Award

The CEC Research Award recognizes an individual or research team whose research has made significant contributions to the education of exceptional children and youth.

CEC Business Award

The CEC Business Award recognizes a business or corporation that has promoted and provided for the enhancement and employment of individuals with exceptionalities in order to promote and support their full participation in the community.

CEC Outstanding Public Service Award

The CEC Outstanding Public Service Award recognizes an individual from the United States or Canada whose actions in the governmental and political arena have been of national significance for individuals with exceptionalities.

☞ The nominations packet for the CEC awards is on CEC's Website, www.cec.sped.org. It can also be obtained by contacting CEC at (toll free) 888/232-7733 or e-mail service@cec.sped.org.

Outstanding CEC Student Member of the Year Award (Undergraduate and Graduate)

This award recognizes both an undergraduate and a graduate student who have made outstanding contributions to CEC and exceptional children.

Graduation Award (Undergraduate and Graduate)

To encourage professional membership in CEC and provide for expenses incurred while in school, CEC awards two graduation stipends, one to an undergraduate and one to a graduate CEC student member upon completion of their education.

Kayte M. Fearn CEC Ethnic Diversity Student Scholarship

Each year CEC awards a scholarship to a culturally diverse CEC student member who has made outstanding contributions to CEC and to exceptional children. In 2007, this award was renamed in honor of Dr. Kayte M. Fearn, who in her 67-year career in special education worked to enhance educational opportunities and education success for professionals and students from diverse ethnic backgrounds.

Susan Phillips Gorin Award

This award honors CEC professional members, especially advisors, who demonstrate exemplary personal and professional qualities and make outstanding contributions to Student CEC and exceptional children. The award was named for Ms. Gorin who served as the coordinator of student activities from 1975-1982.

☞ The nominations packet for CEC Student awards is on CEC's Website, www.cec.sped.org. It can also be obtained by contacting CEC at (toll free) 888/232-7733 or e-mail service@cec.sped.org.

Yes I Can! Awards Program

The *Yes I Can!* Awards honor students who have excelled despite their disability. Awards are given for achievement in academics, the arts, athletics, community service, employment, extracurricular activities, independent living skills, self-advocacy, and technology. Each year, 27 winners, selected from the students who have been nominated, are recognized at a special awards ceremony and reception at the Council for Exceptional Children's Annual Convention & Expo. Everyone is a winner! Each individual nominated for the *Yes I Can!* Awards will receive a certificate of achievement personally inscribed with his/her name suitable for framing. Braille certificates are available upon request. Contributions to the *Yes I Can!* Awards program are tax deductible. Contribute online through the CEC Web site at www.cec.sped.org, or mail your contribution to CEC Headquarters.

☞ The nominations form and submission information for the Yes I Can! Awards is on the CEC Web site at www.cec.sped.org. It can also be obtained by contacting CEC (toll free) 888/232-7733 or e-mail service@cec.sped.org.

Have questions about the *Yes I Can!* Awards? E-mail yesican@cec.sped.org or call CEC at 888/232-7733.

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5.08 HOW TO ORGANIZE A NEW CEC CHAPTER

Chapters provide interaction with members, potential members, and exceptional individuals on the local, grassroots level. Organizing a new chapter is easy! You'll need to:

1. Contact CEC Membership Services for the chapter organizational kit at 800/224-6830 or e-mail mbrship@cec.sped.org. Please specify whether you want the kit for a student chapter or professional chapter (their constitutions are different) and provide your name and address.
2. Contact the CEC president in your state/province (there's a list on the CEC Web site at www.cec.sped.org; click on "States" or "Provinces" on the left of the home page). Let them know you're interested in organizing a chapter, and find what requirements you'll need to meet in order to become an officially recognized chapter. Please note that recognition of your chapter comes from your CEC state/provincial unit – not CEC Headquarters.

Student chapters should also check with the student activities office on your campus for information on how to become a recognized organization at your college/university.

3. Schedule a meeting, and invite everyone who might be interested! At this meeting, appoint or elect officers, establish committees, and sign up new members.

Depending on the requirements of your CEC state/provincial unit, you'll need at least 10-15 members. These can be both new members and transfers from other chapters. For new members, you'll need to send their membership application and payment to CEC or encourage them to join on the CEC Web site (www.cec.sped.org); for members transferring into your chapter, complete the membership transfer form.

4. A. Complete and submit these materials to your CEC state/provincial unit:
 - Chapter application
 - List of officers
 - Constitution and bylaws
 - List of the new members who are submitting membership applications and payments to CEC
 - Photocopy of membership transfer form (list of current members who wish to be assigned to your chapter)B. Submit these materials to CEC:
 - Membership applications and payments from new members
 - Membership transfer form

That's all there is to it! Your CEC state/provincial unit will contact you if they have any questions and will notify you when your chapter has been officially recognized. If you are forming a new chapter, they will also notify you when your chapter number has been assigned.

Questions? Please contact your CEC state/provincial unit. For general information and CEC membership materials, call CEC Membership Services at 800/224-6830.

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5.09 HOW TO ORGANIZE A NEW SUBDIVISION

A subdivision is a state, province, or Canada-wide unit comprised of members of a specific international division. For example, the Virginia DEC Subdivision (often referred to as “VA DEC”) is comprised of all DEC members in Virginia.

Subdivisions provide networking, professional development, and information-sharing for division members in their state or province. Typical subdivision activities include sponsoring or participating in state/provincial conferences, publishing a newsletter, political advocacy efforts, and supporting the activities of other CEC units. The activities conducted by each subdivision are determined by its members and officers.

Organizing a new subdivision is easy! You’ll need to:

1. Contact CEC for the subdivision organizational kit at 800/224-6830, ext. 433 or e-mail mbrship@cec.sped.org. We’ll send you the kit that includes the contact information for your international division and CEC state/provincial unit.
2. Contact the international division to find out what requirements you’ll need to meet in order to become an officially recognized subdivision. You’ll also want to contact the CEC state/provincial unit to elicit their support, too. Please note that recognition of your subdivision comes from your international division – not CEC Headquarters.
3. Schedule a meeting, and invite all division members and other interested persons within the state/province. The CEC state/provincial annual conference is a good time to hold this meeting, but it may be held at any time. At this meeting, appoint or elect officers, establish committees, and sign up new members

You’ll need at least 15 members to start your subdivision. These can be both new members and renewing members. For new members, distribute the membership application for them to complete and send to CEC with their dues payment, or encourage them to join online on the CEC Web site (www.cec.sped.org).

4. Complete and submit these materials to your international division:
 - Subdivision application
 - List of officers
 - Constitution and bylaws

Note: The international division may require additional materials.

That’s all there is to it! Your international division will contact you if they have any questions and notify you when your subdivision has been officially recognized.

Questions? Please contact your international division. For general information and CEC membership materials, contact CEC’s Constituent Services Center at 888/232-7733 or e-mail service@cec.sped.org.

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5.10 HOW TO ORDER MEMBERSHIP LISTS

Your unit's membership list is available to you electronically at no charge! Only officers and committee chairs are authorized to place an order.

The membership lists are sent via e-mail with an attached file containing the member ID#, name, mailing address, daytime phone number, home phone number, e-mail address, membership start and expiration dates, membership type, chapter affiliation, and division memberships. The file is in Excel format.

To order, contact CEC Headquarters:

- State/provincial units and chapters: Dao Tran, Membership Services, mbrship@cec.sped.org, 800/224-6830, ext. 432.
- Divisions and subdivisions: Anna Henderson, annah@cec.sped.org, 800/224-6830, ext. 433.

Provide the following information:

- Unit name. Chapters must also provide chapter number.
- Name, daytime telephone number, and e-mail address of person to receive the file.
- Date needed. Please allow 3-5 working days.
- Need instructions for creating mailing labels? Just ask!

Your membership list can be used only by your unit for activities sponsored or co-sponsored by your unit. Unauthorized users will be billed. Other persons, organizations, and companies who want to reach your members regarding job openings, surveys, conferences, products or services must contact CEC's Director of Advertising and Sales at 800/224-6830 to rent the membership list. On the CEC membership application and renewal form there is a space for members to indicate they don't want their name released to other organizations or companies. Please help us ensure that their privacy is respected by not distributing your membership list to unauthorized users. Thank you for your cooperation.

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5.11 RESOURCE MATERIALS AVAILABLE FOR UNIT LEADERS

CEC has a variety of resources to provide unit officers with information, guidelines, and materials to help perform their roles and plan and conduct unit activities.

Online resources:

On the CEC Web site – www.cec.sped.org – go to the Unit Leaders' Resource section to access:

- Membership Recruitment Materials: CEC membership applications, promotional materials including flyers, membership materials order form, instructions for ordering membership lists, and logo products order form.
- Unit Organizational Materials: information and forms for starting/reactivating chapters and subdivisions, officer reporting forms.
- Student Chapter Materials: Information and materials for student chapters and their advisors.
- Officer Resource Materials: Officer guidelines, how to order membership lists, how to properly use the CEC logo, financial and legal Q&A, calendar of events, and more.
- Leadership Training and Meeting Materials: Presentations and handouts from the CEC Leadership Institutes and meetings at the annual convention.

Other resources:

TO THE POINT is a resource handbook containing fact sheets addressing five areas:

1. *Officer Roles and Responsibilities* includes guidelines for officer positions.
2. *Committee Roles and Responsibilities* covers types of committees and typical committee roles.
3. *Unit Activities* provides ideas for planning, implementing and evaluating unit activities as well as suggestions for specific types of activities.
4. *Membership Development* addresses the recruitment and retention of members.
5. *Unit Resources* includes general information about CEC and other relevant information for units.

CEC Policy Manual sets forth the principles which guide elected and appointed officials and staff in fulfilling the mission, purposes, and program of CEC. It contains CEC's organizing policies, operational policies and procedures, professional policies, plus appendices.

Guidelines for Units on Legal Issues is a primer on topics including tax exemption, incorporation, employer identification number, tax returns, liability, bonding, and lobbying.

Exceptional Children's Week contains guidelines for how to organize, plan and launch an Exceptional Children's Week program in your community. Exceptional Children's Week is a means for educating the public about children with disabilities and garner support for them and special education.

These materials are available upon request in limited quantities—at no charge—from CEC's Constituent Services Center. Contact us at (toll free) 888/232-7733 or service@cec.sped.org.

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5. UNIT RESOURCES

5.12 FINANCIAL AND LEGAL Q&A FOR CEC UNITS IN THE U.S.

This Q&A briefly addresses some of the questions units have concerning financial and legal issues. It should not be assumed that the information below is tantamount to legal advice. Should you have further questions, we suggest you contact an accountant, an attorney, or your local IRS office, as applicable. To obtain any of the Internal Revenue Service publications mentioned below, contact your local IRS office.

WHAT'S AN EMPLOYER IDENTIFICATION NUMBER?

An EIN is like a Social Security number for an organization. Even though CEC units are not usually employers, they are required to file form SS-4 (Application for Employer Identification Number) and receive an EIN as nonprofit organizations, specifically as nonprofit educational associations. The form includes all necessary instructions for filing; the process is quite simple and quick. The EIN "belongs" to your unit and will not change when your treasurer changes.

HOW DO WE OPEN A BANK ACCOUNT?

Choose a bank that is both convenient and known for its service to nonprofit groups. The type of account you establish depends on the services you require. Many banks require the group's EIN to open the account, so you should acquire your EIN beforehand. By using your unit's EIN, you will avoid having to use a member's personal Social Security number when opening your unit's account.

ARE TAX EXEMPT STATUS AND INCORPORATION THE SAME THING?

No. Tax exempt status is a financial issue primarily related to federal income tax. Incorporation is primarily a legal issue. Incorporation limits liability to the assets of the corporation.

AS A UNIT OF CEC, ARE WE AUTOMATICALLY TAX EXEMPT?

NO. CEC units are not tax exempt unless they have applied for and received tax exempt status. **CEC's tax exempt status (501(c)(3)) does NOT cover its units.** When CEC applied for a group exemption in 1993, it was informed by the IRS that in order to qualify for the group exemption, "the subordinates are subject to the general supervision and control of the parent organization." In accordance with CEC policy, CEC does not (fiscally) supervise or control its chapters, state/provincial units, divisions or subdivisions. Therefore, CEC cannot "extend" its tax exempt status to its units under the present IRS regulation.

SHOULD WE APPLY FOR TAX EXEMPT STATUS?

There is no answer that applies to every CEC unit. The advantages of being a tax-exempt organization include: (a) contributions to domestic organizations are deductible as charitable contributions on the donor's income tax return; (b) the organization's chances for receiving a privileged postal rate are greatly increased; and (c) the organization is often exempt from state and local taxes. These "benefits" may not be needed by your unit. Some units feel that the time and expense incurred to file for tax exempt status and fulfilling the requirements to retain tax exempt status outweigh the benefits.

HOW DO WE APPLY FOR TAX EXEMPT STATUS?

Normally, an attorney is used to prepare and file the necessary documents. IRS Form 1023 (Application for Recognition of Exemption Under Section 501(c)(3) of the Internal Revenue Code) must be completed and submitted along with supporting documentation to the IRS. In addition to the attorney's fees, it will also require the payment of an application fee that ranges from \$100 to \$500 depending on the annual budget of the applying organization. Although CEC cannot assist its units in applying for tax exempt

status, it may be helpful for unit officers to examine CEC's completed Form 1023. Contact CEC's Constituent Services Center (toll free 888/232-7733 or e-mail service@cec.sped.org) for a copy. IRS Publication 557, "How to apply for and retain exempt status for your organization" may also be helpful.

DO WE HAVE TO BE INCORPORATED TO APPLY FOR TAX EXEMPT STATUS?

Not necessarily.

SHOULD OUR UNIT INCORPORATE?

There is no answer that applies to every CEC unit. CEC is organized as a corporation, as are some of its units. However, a majority of CEC units are unincorporated. A major disadvantage of not incorporating is that the members or organizing individuals may be held personally liable for torts and contractual obligations of the organization. There are substantial advantages to incorporation including "Corporate status...in most cases provides a liability shelter against individual financial responsibility for corporate officers and directors." For the most part, incorporation is not required of associations either for the purpose of carrying on normal activities or for applying for nonprofit status.

HOW DO WE INCORPORATE?

Normally, an attorney is used to prepare and file the necessary documents in the state in which you wish to incorporate. In addition to the attorney's fees, there is a filing fee and annual renewal fees for incorporation. Although CEC cannot assist in this procedure, it may be helpful for unit officers to examine CEC's Articles of Incorporation when preparing their own application. Contact CEC's Constituent Services Center (toll free 888/232-7733 or e-mail service@cec.sped.org) for a copy.

ARE WE SUPPOSED TO FILE A RETURN WITH THE IRS?

For some units, the answer is yes; for others, no. We suggest that you contact an accountant or attorney to determine what is required for your unit. If your unit has obtained 501(c)(3) tax exempt status, you are required to file IRS Form 990 and possibly Form 990T depending on the amount and types of your revenues. In some cases, no filing is needed.

HELP--I'M REALLY CONFUSED! WHERE CAN I GET MORE INFORMATION?

CEC has prepared a [Guidelines for Units on Legal Issues: A Primer](#). This document provides additional information on the topics covered in this Q&A and other legal/financial issues. Contact CEC's Constituent Services Center (toll free 888/232-7733 or e-mail service@cec.sped.org) for a copy. To obtain any of the Internal Revenue Service publications mentioned above, contact your local IRS office. Should you have further questions, we suggest you contact an accountant, an attorney, or your local IRS office, as applicable.

CEC 6/30/04

TO THE POINT

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5. UNIT RESOURCES

5.13 GUIDELINES FOR UNIT ARCHIVES*

CEC Headquarters houses the CEC Archives. The purpose of the CEC Archives is to collect and to provide physical protection in one place for historically valuable records developed by the Council for Exceptional Children. Various units of CEC, including divisions and state/provincial units, have organized their own archives. Every unit has significant accomplishments, remarkable members and leaders, and historic occasions to preserve. This section will provide some guidelines for developing your unit's archives.

An **ARCHIVES** is defined as a repository for records of continuing or permanent value to an organization, **or**, the records of continuing or permanent value to an organization. **RECORDS** are defined as paper documents, photographs, audio visual material, etc. that have been developed by the unit by virtue of its organizational structure and growth or as a product of the unit.

Steps in organizing your archives:

- **FIRST**, establish a mission statement. What is to be collected: from whom, for whom, why, and how maintained.
- **NEXT**, determine what types of records to collect. For example, these types of materials should be included to develop a history of the organization or to review past actions:
 - Organizational material about the beginning of the unit: correspondence, notices, petition, first minutes, information about leaders, any particular problems or goals in mind at organization, the charter. End of the year reports submitted to CEC or the state/provincial unit or division.
 - Governmental records. Minutes of meetings. End of the year committee and officer reports. Lists of officers, committee chairs and members—year by year.
 - Policy statements.
 - Photographs or audio records of meetings, officers, members, and products developed.
 - Publications including journals, newsletters, and conference/convention programs. One copy of each. (It is important that these not be "loaned.")
 - Important correspondence. File with officer reports/governmental reports or separately. Establish a pattern that makes sense to you and live with it.

General rules to live by:

- Determine the file order (classification) you will use. For instance, it is helpful to keep records in each group in the order in which they were created.
- Establish an accession policy. When do you ask officers/committees for the records destined to go into the archives? Make someone responsible for collecting and accessing material.
- Keep a record of what you have in the archives. Basic finding aids include a list by topics and under each topic either a general description or a specific list of each document/record. Keep this with the collection and make it available to selected officers of the organization (it is suggested that the Historian, President and Secretary have copies of the list). Keep current.
- Do not remove originals from the archives. Make copies, but—once in the archives, leave the records in the archives. Any value to the unit of the archives is lost if items can be removed.

*These guidelines were provided by June Robinson, who served as CEC's Archivist for many years.

- Provide for continuity. Make the archives self-perpetuating. Create an ongoing position of Historian or Archivist who will collect and maintain the records.
- Provide for the storage of your materials. It is best that they not be moved frequently to protect against damage or loss.
- Provide for conservation of your materials. For the records destined for the archives, use acid-free paper or high quality bond paper. Use special folders for material that will be destined for the archives that are as acid free as possible.
- Store all archives materials in a metal file cabinet. Metal is more permanent than cardboard boxes which could be ruined by moisture and acidic cardboard content, and will probably ensure permanence – especially if well identified.