

MANUAL OF OPERATIONAL PROCEDURES
AMERICAN HANDWRITING ANALYSIS FOUNDATION



PURPOSE of the MoP

- To standardize the operation of each office and committee.
- To augment the bylaws with the detailed functions of each office and committee
- To provide written guidelines for each officer and/or committee chairperson on the board.

Changes in this manual of operating procedures are to be voted by the board of directors.

The AHAF cabinet is comprised of an executive board (president, vice-president, treasurer, secretary), which may vote on issues by itself, and committee chairs.

AHAF is a 501 (c)6 corporation, which is a business league. The Mission of AHAF as stated in the bylaws is as follows:

To promote and advance the profession of handwriting analysis.

1. Unite those engaged in the study and/or practice of handwriting analysis as a means of advancing the use and understanding of handwriting as a helping profession; to educate and inform members and the general public; to foster research and increase knowledge in the field; to conduct seminars and classes within the public and private educational systems; to promote the understanding and practice of handwriting analysis by qualified analyst.
2. Establish and maintain a dynamic code of ethics that dictates a high standard of conduct and helps develop handwriting analysis as a valid science.
3. Provide standard certification testing.
4. Provide communication through the AHAF Executive Board Report on progress, activities, and education of AHAF members.
5. Establish local chapters and study groups.
6. Stimulate public relations within the community of handwriting analysts and with the public at large.
7. Provide an informative, educational publication.

Duties of nonprofit board members include the following:

Duty of Care, legal and fiduciary: Board members must be good stewards of the organization's funds, steering the organization towards a sustainable future by adopting sound, ethical, and legal governance and financial management policies. This includes reviewing and approving budgets to protect the organization's assets. Board members will approve major organizational decisions including planning for programs and related expenditures.

Duty of Loyalty: Ensure that the activities and transactions of the organization are, first and foremost, advancing its mission; Maintain confidentiality among the AHAF Board of Directors and committee chairs regarding discussions and decisions that pertain to the organization, its activities, or its members; Recognize and disclose conflicts of interest; Make decisions that are for the best interests of the organization without undue influence for the benefit of any individual member, organization, or company.

The legal and ethical requirements for elected or appointed service in AHAF dictate that key members of AHAF may in some instances present a conflict of interest if they hold concurrent decision-making positions in other handwriting organizations. AHAF officers, board members, committee members, key personnel, and consultants who serve within other handwriting organizations are required to disclose their roles and responsibilities to the President. The President will determine whether the activities of those members pose a potential conflict of interest and make appropriate recommendations.

Duty of Obedience: Ensure the organization obeys applicable laws and regulations; follows its own bylaws; and adheres to its stated corporate purposes/mission.

Duties of Compliance and Support: Board members and committee chairs must adhere to the Duties of Care, Loyalty, and Obedience and foster a positive culture in the organization. Board members and committee chairs are required to support board decisions even when they voted against them, unless such decisions are unethical or violate the bylaws or policies of the organization.

Governance: AHAF cabinet members must remain informed about trends regarding handwriting, handwriting analysis, and professionalism and convey such information to members. They are expected to oversee the day-to-day operations within their scope of service to the organization and plan programs and operations that benefit the members and contribute to improved understanding of handwriting.

Advocacy for the organization's mission: Spreading the word about the organization helps it to grow and flourish. Board members publicly advocate for the organization's mission. This includes public relations and interacting or interviewing with media. They have a responsibility to foster good will among the members and the public by refraining from disrespect toward members, the organization, and individuals outside the organization. They are also responsible for ensuring good will with members and the public.

Overseeing Agendas and Minutes: Accurate documentation protects the organization from potential legal issues. While the secretary bears the main responsibility for preparing minutes and agendas, the entire board has a responsibility to make sure they are reported accurately.

Board members should read, accept, and sign a Statement of Understanding that defines their roles, responsibilities, and limits of authority prior to accepting a position: While not legally enforceable, such agreements clarify expectations and ensure that responsibilities of board members and committee chairs are mutually understood.

NEW EXECUTIVE BOARD NOMINEES

Submit biography, photo, and handwriting sample to the editor for inclusion in the April AHAF newsletter prior to election.

Board Member's Organizational Strategy

The president, in consultation with the board members and committee chairs, establishes a strategic plan each year to advance the goals of the organization. The president delegates

responsibilities for achieving the yearly goals to each board member and committee chair according to their role. The board members and committee chairs will monitor and measure progress toward meeting the assigned goals and responsibilities and report the impact of those efforts to the president.

Board Meetings are conducted twice yearly or more often when necessary to make decisions for the organization. Meetings may be conducted in person, by phone or email, or through web conferencing as approved by a majority of the intended attendees.

Annual Membership Meeting held yearly in July via web conferencing if no in-person conference is scheduled, or other mode of delivery that encourages participation, as approved by the board of directors.

General Membership Conference, offered every two years (biennially) in person, as a web conference, or through other modes of delivery to enable participation, as approved by the board of directors.

Annual Cursive is Cool Contest, begins on National Handwriting Day, January 23rd and is complete in April unless the chair extends the deadline.

Board members should plan for their successors: Long-range succession planning and recruitment of candidates for board positions should be undertaken by all board members to ensure continuity. Exiting board members will provide the methods, documents, and tools of their office to their successor within 30 days of the end of their term. Existing board members are urged to help new board members ease into their positions, helping and mentoring them, and finding the best ways to use their talents and abilities.

AMERICAN HANDWRITING ANALYSIS FOUNDATION

www.ahafhandwriting.org

ORGANIZATIONAL STRUCTURE

EXECUTIVE BOARD

(Elected Officers)

President, Vice President, Treasurer, Secretary

BOARD OF DIRECTORS

Elected Officers

Immediate Past President

Chairpersons

CHAIRPERSONS APPOINTED BY PRESIDENT

Research

Education/Certification

Newsletter Editor

Communications

Campaign for Cursive

Librarian/Archivist

Ethics

Website Manager

(ad hoc committees as appointed by the president, e.g.: Conference, Nominations)

GENERAL FORMAT of the manual of operating procedures

Description of each office and regular duties

Privileges and Reimbursements

Contents of Files

APPENDIX A

How to form a new AHAF chapter

APPENDIX B

Statement of Agreement

EXECUTIVE BOARD

PRESIDENT

The executive office of president requires the member to be certified by AHAF.

Post-election

Prepare acceptance speech for the annual business meeting, outlining goals.

Devise short- and long-term goals with the board of directors and state goals clearly for the board and membership.

Schedule a meeting with the board in person, by email or web conference to implement goals.

Make committee chairperson appointments.

Send new president's message to newsletter editor for official publication to membership.

General responsibility of the president of AHAF

Leadership of an organization in a dynamic climate requires timely and uncomplicated means for advancing the organization, addressing needs of the members, ensuring the effective functioning of officers and appointees, adapting to emerging trends, building good will, and managing events that impact the organization.

To accomplish these goals...

THE DUTIES OF THE PRESIDENT SHALL BE TO

- Assume the role, responsibility, and duties of president at the end of the annual meeting in election years.
- Preside at all regularly scheduled meetings in accordance with parliamentary procedures.
- Appoint committee chairpersons.
- Supervise the effective functioning of officers and appointees.
- Approve unbudgeted expenditures of up to \$50 without a board vote.
- Direct internet and media functions and respond to public inquiries from each.
- Direct the maintenance of the official AHAF web site.
- Provide an annual report to the membership by official means (email, postal mail or electronic methods).
- Prepare quarterly President's Message for inclusion in the official newsletter.
- Safeguard organizational documents, sample forms and letters, and relinquish them to the successor within thirty (30) days of the end of term of office. Records and files may be in the form of hard copies, digital, electronic, including content on the AHAF website.
- Support the AHAF Code of Ethics. In consultation with the ethics chair and relevant members of the board of directors, the president will initiate appropriate education and/or disciplinary procedures with members who fail to comply with the standards of the organization or violate the AHAF Code of Ethics.

Schedule and conduct meetings of the executive board and the board of directors

- Schedule board and business meetings quarterly or more often as necessary to conduct the business of the organization.
- Review progress or status reports from board members and committee chairs at meetings of the executive board or full board of directors.
- Review current policies with the board of directors during scheduled board meetings, or with the executive board at emergency sessions; facilitate discussion and vote on revisions if indicated.
- Remove, reassign, appoint, and/or expand board positions, committees and key personnel, and/or fill vacant positions in consultation with the Executive Board. Meetings or consultations for this purpose may be held outside of quarterly meetings in person, by phone, email, or by electronic means to expedite informed decision-making.
- Conduct meetings with the Executive board if urgent situations arise where a full meeting of the Board is not feasible. Such meetings may be conducted by email, phone, web conferencing, or other electronic means.
- Results of such meetings will be provided to the full Board of Directors by the president. The secretary will produce and file a memo of the meeting including items discussed and results.

Assist with bi-annual membership conference

- Appoint conference chair and attend committee meetings.
- Conduct board meeting two months before the conference to finalize and approve agenda and details.
- Give welcoming address.

Plan and conduct annual organization business meeting

The annual meeting may occur as one of the events of the membership conference when the two gatherings coincide. In that case, the president collaborates with the conference committee to schedule and plan events for the annual meeting.

- Create agenda for Annual Meeting.
- Review annual reports from each chairperson prior to the annual meeting
- Provide status or progress reports of organization committees and operations to the membership at the Annual Meeting.
- Install new officers at annual meeting when members are elected to fill positions or assigned to fill a vacancy.
- Introduce committee chairs, who will provide status or progress reports to the membership.
- Arrange for the installation of new officers at the annual meeting when executive board members are elected to fill positions.

PRIVILEGES AND REIMBURSEMENTS OF THE PRESIDENT

Receives 100% waiver of annual dues during term (beginning at dues date following an election).

Receives 100% expenses of registration, room and on-site board at conference.
Receives 100% of coach airfare to annual conference or reimbursement for cost of ground travel (not to exceed cost of coach airfare.)
Receives reimbursement for unusual expenditures with executive board approval.
Receives out of pocket expenses from treasurer.

CONTENTS OF FILES

Articles of Incorporation with the state seal.
AHAF constitution, bylaws and code of ethics.
List of current membership.
Charter membership list and Bylaws of each Chapter.
Minutes of all annual meetings, executive board and board of directors' meetings.
Treasurer's quarterly reports and annual budgets.
Annual reports from each chair.
Roster of AHAF members for each year since charter in 1968.
List of all national officers and chairs since charter in 1968.
Official correspondence.
Copies of all AHAF periodicals and conference programs.
Records and files may be in the form of hard copies, digital, electronic, or on the AHAF website.

VICE-PRESIDENT

The office of vice-president requires the member to be certified by AHAF.

THE DUTIES OF THE VICE PRESIDENT SHALL BE TO

- Assume duties at the end of the annual meeting in election years.
- Provide counsel to the president.
- Assume the duties of the president when the president is unable to serve.
- Attend regularly scheduled board meetings.
- Update Life member status yearly (active or not).
- Encourage new members to participate in AHAF activities and take advantage of benefits.
- Process and charter new chapters in the absence of a chapter coordinator.
- Provide an annual report to the president.
- Safeguard organizational records, sample forms and letters, and relinquish them to a successor within 30 days of end of term. Records and files may be in the form of hard copies, digital, electronic, or on the AHAF website.

Serve as membership chair as follows:

- Respond to new and renewing members
- Send a welcome email to new members and provide with official documents, including a certificate of membership, AHAF standards, bylaws, code of ethics.
- Direct web manager to add new members to the general online directory

- Direct the newsletter editor to include in general directory. Certified members receive a free listing in the Find-a-Professional directory.
- Send a thank-you email to renewing members.

PRIVILEGES AND REIMBURSEMENTS OF THE VICE-PRESIDENT

100% waiver of annual dues during term (beginning at dues date proceeding elections).

100% waiver of registration fees at annual conference.

50% coach airfare to conference (or in-person board meeting) or receive reimbursement for travel expenses (up to 50% coach airfare rate.)

Be reimbursed promptly by the treasurer for approved out-of-pocket expenses.

CONTENTS OF FILES

Bylaws and manual of operating procedures

Code of ethics.

Maintain a current membership list as provided by the treasurer.

Maintain a chapter membership list with bylaws and list of officers of each chapter.

Applications for membership including direct web site submissions.

Records and files may be in the form of digital, or electronic records, including content on the AHAF website.

SECRETARY

THE DUTIES OF THE SECRETARY SHALL BE TO

- Assume duties at the end of the annual meeting in election years.
- Attend scheduled board meetings, generate and distribute minutes to board for approval.
- Maintain copies of current bylaws, manual of operating procedures, code of ethics and other relevant organization documents; record all updates and submit to board and membership after approval.
- Keep official record of board activities, motions and votes.
- Receive and count ballots from membership votes; notify president promptly of total. A committee member may be appointed to fulfil this duty, which is carried out through electronic means.
- Report election results to the newsletter editor by June 1 in election years and distributed to the membership 30-days prior to the annual meeting. Results reported to the newsletter editor for inclusion in the July 1st issue.
- May act as additional signer on AHAF checking account
- Provide web manager with copies of organizational records to be maintained in the board area of the AHAF website.
- Records and files may be in the form of physical, digital, or electronic records, including content on the AHAF website.

PRIVILEGES AND REIMBURSEMENTS OF THE EXECUTIVE SECRETARY

100% waiver of annual dues during term (beginning at dues date prior to elections).

100% waiver of registration fees at annual conference.

50% coach airfare to conference (or in-person board meeting) or receive reimbursement for ground travel expenses (up to 50% coach airfare rate.)

Be reimbursed promptly by the treasurer for approved out-of-pocket expenses.

CONTENTS OF FILES

Records of all past meeting minutes and attendance

Updated record of all organizational documents

Copies of official correspondence

Records and files may be in the form of physical, digital, electronic records, including content on the AHAF website.

TREASURER**THE DUTIES OF THE TREASURER SHALL BE TO**

- Assume duties at the end of the annual meeting in election years.
- Attend regularly scheduled meetings.
- Be custodian of AHAF funds.
- Collect monies, pay invoices, and otherwise disperse funds on board-approved expenditures.
- Pay within 7 days signed expense vouchers from board members and committee chairs when accompanied with valid receipt. Payment may be made via AHAF's PayPal account or check.
- Be a signatory on AHAF checking account, along with the president and secretary. Only one signature is required for budgeted or approved expenses.
- Maintain a checking account and corresponding records, as well as AHAF's investment account.
- Submit reports quarterly or upon request of bank balances, income and expenses.
- Coordinate with tax consultant and submit all relevant documents to the IRS and State Franchise Tax Board as required under nonprofit status (I-90 postcard in CA).
- Notify members by email of upcoming dues date (January 1) at intervals of 1 month and again at 2 weeks in advance.
- Notify members of delinquency of dues by postal mail at intervals of two weeks, 30 days, and final notice on March 1. Notify board of delinquent members.
- Establish fund for conference preparations for the conference chair (budget agreed upon by the board and conference chair).
- Have books reviewed by an independent auditor at the end of every two-year term and before relinquishing records to successor within 30 days of the end of final term (currently that auditor is Linda Wall, a nonmember).
- Safeguard organizational records, sample forms and letters, and relinquish them to successor within 30 days of end of term. Records and files may be in the form of physical, digital, or electronic records, including content on the AHAF website.

PRIVILEGES AND REIMBURSEMENTS OF THE TREASURER

100% waiver of annual dues during term (beginning at dues date proceeding elections).

100% waiver of registration fees at annual conference.

50% coach airfare to conference (or in-person board meeting) or receive reimbursement for travel expenses (up to 50% coach airfare rate.)

Be reimbursed promptly for approved out-of-pocket expenses.

CONTENTS OF FILES

Bylaws and manual of operating procedures

Code of Ethics

Current roster of membership with designations of new, renewed, Life, and certified status.

Bank accounts and other income accounts.

Records of income and donations including conference, certification, membership dues.

Records of annual expenditures including production of publication, record of reimbursements (with receipts).

Records of recipients of any funds disbursed for scholarship or memorial.

Forms for necessary business, such as expense vouchers, quarterly operating reports, CA state nonprofit exemption forms.

Records and files can be in the form of physical, digital, or electronic records, including content on the AHAF website.

ADVISORY BOARD MEMBERS

THE DUTIES OF THE IMMEDIATE PAST PRESIDENT SHALL BE TO

- Advise the president on matters of administration of the office.
- Review actual or potential ethical infractions with the ethics chair. In consultation with the ethics chair, determine appropriate education or disciplinary actions necessary to prevent or respond to ethical violations, and report recommendations to the Executive Board. Recommend revisions to code of ethics every five years.
- Review and revise manual of operating procedures whenever necessary, but a minimum of every five years.

COMMITTEE CHAIRS

EDUCATION/CERTIFICATION

EDUCATION CHAIR

Appointed by the president and is a member of the AHAF Board of Directors

THE DUTIES OF THE EDUCATION CHAIR SHALL BE TO

- Evaluate various courses and advise board of available high-quality courses. Submit board-approved courses to the web manager for inclusion on website.
- Coordinate the establishment of study groups as a benefit of membership.
- Interested members and guests are notified of each group meeting. Handouts and samples for meeting discussion are supplied by email or made available on the website.
- Be available to answer questions regarding any education programs offered by AHAF.
- Inform membership of seminars, programs and speakers that advance the education of members.
- Promote community awareness of handwriting analysis and AHAF, whenever possible using members who lecture and teach.
- Develop education programs on the use of handwriting analysis as a helping profession.
- Regularly advertise and promote the mentor program, applicable continuing education requirements, study guide, and suggested reading list in the official newsletter.
- Coordinate with the membership chair (VP) to pair interested members with mentors.
- Direct mentors to resources designed to help them advance the members they are paired with.
- Submit annual report to president.
- Safeguard organizational records, sample forms and letters, and relinquish them to a successor within 30 days of end of term. Records and files may be in the form of hard copies, digital, electronic, or on the AHAF website.

PRIVILEGES AND REIMBURSEMENTS

100% waiver of dues during term beginning with the dues period proceeding appointment.

50% waiver of conference registration when AHAF hosts conference.

Be reimbursed promptly for approved out-of-pocket expenses.

CONTENTS OF FILES

Study guide, code of ethics, recommended reading list.

List of current educational courses and instructors.

Certification requirements.

List of mentors.

Records and files may be in the form of hard copies, digital, electronic, or on the AHAF website.

CERTIFICATION

Appointed by president. Must be AHAF-certified and is a member of the AHAF Board of Directors

THE DUTIES OF THE CERTIFICATION CHAIR SHALL BE TO

- Appoint a minimum of three and up to five AHAF-certified committee members to critique and score each exam submission anonymously. (Committee appointments are without a vote on Board of Directors).
- Provide committee members with grading criteria and scoring sheet as guidelines for scoring exams.
- Publish on the website and in the examination application the criteria and standards set forth in the manual of operating procedures.
- Establish the qualifications of each applicant.
- Assign a code number to each applicant, to be used in place of their name for committee judges.
- Provide applicant with exam and instructions.
- Maintain a record of each applicant's code number, deadlines, test results and certification status.
- Recommend fee increases as needed for board approval.
- Send an email to the applicant with the results of each graded exam and status at conclusion of the process.
- Present member with a certificate signed by the president and the certification chair. Applicant should receive certificate within thirty days.
- Request a photo and short biography of newly certified members for inclusion in the newsletter. Obtain permission to post name on website and in the professional directory.
- Provide applicants with post-exam evaluation questionnaire within thirty 30 days.
- Submit periodic articles for AHAF newsletter about certification program.
- Encourage members to become certified.
- Submit annual report to President.

- Safeguard organizational records, sample forms and letters.
- Relinquish all records and files to a successor or the president within 30 days of end of term. Records and files may be in the form of physical, digital, or electronic records, including content on the AHAF website.

CERTIFICATION EXAMINATIONS

- Exams will include theoretical and technical questions and varying types of analysis.
- Each exam will be scored and critiqued anonymously by a panel of not less than 3 and as many as 5 certified judges.
- The criteria for scoring exams will be clearly stated.
- The minimum score stated on Part 1 must be met in order to proceed with Part 2.
- Clear reasons and recommendations will be provided in the case of a failed exam.
- One no-fee retake is allowed on Part 1. Thirty days will be allowed for resubmission. One no-fee retake is allowed on Part 2. Sixty days will be allowed for resubmission. A second failure on either part requires a six-month study period and a new application fee.
- A certificate and letter of accomplishment will be issued for the successful completion of each exam.

PRIVILEGES AND REIMBURSEMENTS

100% waiver of dues during term beginning with the dues period proceeding appointment.

50% waiver of conference registration when AHAF hosts conference.

Be reimbursed promptly for approved out-of-pocket expenses.

CONTENTS OF FILES

Applications and instructions for each part of the examination.

Directions and requirements for certification.

Exams with handwriting samples.

Completed examinations.

List of all certified members.

List of all committee members and verification of certified status of each.

Instructions and criteria for judges.

Certificates and CHA name badges.

RESEARCH CHAIR

Appointed by the President and is a member of the AHAF Board of Directors

THE DUTIES OF THE RESEARCH CHAIR SHALL BE TO

- Appoint committee persons with expertise in related fields such as psychology, psychiatry, law, medicine, etc. to develop objectives and collaborate in research projects.
- Advise members on accepted research methodology and encourage research programs that ensure the use of valid methods.

- Recommend projects to the board of directors when a member applies for financial assistance.
- Publicize significant research through the AHAF newsletter and other sources available for community and members. Article submissions should be at least once a year.
- Submit annual report to President.

PRIVILEGES AND REIMBURSEMENTS

100% waiver of dues during term beginning with the dues period proceeding appointment.
Be reimbursed promptly for approved out-of-pocket expenses

CONTENTS OF FILES

Records of current and past research projects.
Records and files can be in the form of hard copies, digital, electronic, or on the AHAF website.

EDITOR OF AHAF NEWSLETTER

Appointed by the President and is a member of the AHAF Board of Directors

THE DUTIES OF THE EDITOR SHALL BE TO

- Solicit or produce articles, a president's message, activities of chapters, members and committees, conference information, and related materials for publication.
- Produce a professional publication on a quarterly basis that promotes handwriting analysis and the education and professionalism of handwriting analysts.
- Maintain a current mailing list provided by treasurer.
- Distribute the quarterly publication by email and upload editions to the AHAF website to the members-only area.
- Encourage the exchange of newsletters with other handwriting analysis resources.
- Safeguard organizational records, sample forms and letters and relinquish them to a successor within 30 days of end of term. Records and files can be in the form of hard copies, digital, electronic, or AHAF website.

PRIVILEGES AND REIMBURSEMENTS

Payment and reimbursements to be determined by the board based on membership and stated in a contractual agreement which may be renewable annually.

CONTENTS OF FILES

Articles, handwriting samples
Records and files can be in the form of hard copies, digital, electronic, or AHAF website.

COMMUNICATIONS

Appointed by the President and is a member of the AHAF Board of Directors

THE DUTIES OF THE COMMUNICATIONS CHAIR SHALL TO BE

- Edit and distribute pertinent information to appropriate media for the membership, as needed.
- Maintain and updates AHAF social media pages, including posting meeting announcements, upcoming events, links to other websites, articles, etc.
- Recommend, set up, and maintain new communications media.
- Assist professional members with press release assistance if needed.
- Assist AHAF Chapters in distributing information to members and prospective members.
- Post notices on AHAF blog, if needed.
- Make recommendations for new technology/programs/apps.
- Maintain all information relevant to AHAF communications.
- Assist with promotion of annual Cursive is Cool Contest.

Skills needed for this position:

- Creativity in designing materials and promotional pieces.
- Familiar with Microsoft Office.
- Familiar with Facebook, Twitter, and other social media platforms.
- Familiar with Constant Contact e-news and able to send out messaging if needed.
- Familiar with Excel spreadsheets.
- Familiar with Adobe PDF documents/Adobe Acrobat.
- Willingness to learn new social media as they are created.
- Excellent verbal and written skills, editing skills.
- Ability to create promotional pieces from member-provided content.
- Knowledge and understanding of media communications.
- Knowledge of advertising/promotion issues specific to nonprofits.
- Able to create and make presentations.
- Comfortable connecting with reporters and handling radio/TV interviews.

PRIVILEGES AND REIMBURSEMENTS

100% waiver of dues during term beginning with the dues period preceding appointment.

100% waiver of conference registration.

Be reimbursed promptly for approved out-of-pocket expenses.

CONTENTS OF FILES

Such other information gathered by the Chair relating to the business affairs of AHAF.

LIBRARIAN/ARCHIVIST

Appointed by the president and is a member of the AHAF Board of Directors

THE DUTIES OF THE LIBRARIAN/ARCHIVIST SHALL BE TO

- Develop an annual budget for Board approval for purchases or supplies needed to maintain the library.
- Collect, catalog and shelve all holdings of the library. Post the list of available materials on the website for member access.
- Designate items taken out of circulation if warranted.
- Establish and clearly post procedures for members to borrow or use materials.
- Maintain the library account and manage funds for all library related business.
- Record all library transactions.
- Submit articles and posts advertising and promoting the use of materials to members.
- Determine whether residential insurance coverage is adequate. If not, establish insurance policy to be paid by treasurer. Librarian/Archivist is not personally liable for accidental losses such as fire, natural disasters, unlawful acts, etc.
- Submit annual report to President.
- Safeguard materials, organizational records, sample forms and letters, and relinquish them to a successor within 30 days of end of term. Records and files can be in the form of hard copies, digital, electronic, or the AHAF website.

PRIVILEGES AND REIMBURSEMENTS

100% waiver of dues during term beginning with the dues period proceeding appointment.

50% waiver of conference registration

Be reimbursed promptly for approved out-of-pocket expenses

CONTENTS OF FILES

List of all publications owned by AHAF.

List of borrowed materials.

Financial records.

ETHICS CHAIR

Appointed by the president and is a member of the AHAF Board of Directors

The president should be involved in discussions of any ethical problem involving a member before the member is informed so that the president is prepared if the member contacts him/her to explain, protest, ask questions, or request a change in the penalty or work required to return to good standing.

THE DUTIES OF THE ETHICS CHAIR SHALL BE TO

- Establish ethical standards and uphold that code.
- Review the code of ethics at least every five years and revise as needed.
- Maintain a fair and clear method for dealing with ethics violations.
- Inform a member of an ethical charge in writing within seven days of receiving a complaint.
- Review ethical complaints with past president and submit recommendations to the Board within 30 days.
- Report the details an ethics complaint to the president prior to taking action.
- Send warning, reprimand, request for resignation, or other appropriate notice to charged member within 10 days of report to the president.
- Keep members informed of current laws and issues related to the practice, use, and interpretation of handwriting.
- Submit an article for publication at least once per year.
- Submit annual report to president.

PRIVILEGES AND REIMBURSEMENTS

100% waiver of dues during term beginning with the dues period proceeding appointment.
Be reimbursed promptly for approved out-of-pocket expenses

CONTENTS OF FILES

Current code of ethics

Records of infractions and recommendations

Records and files can be in the form of hard copies, digital, electronic, or the AHAF website.

CAMPAIGN FOR CURSIVE CHAIR

Appointed by the president and is a member of the AHAF Board of Directors

THE DUTIES OF THE C4C CHAIR SHALL BE TO

- Keep members informed of current laws and issues related to cursive training.
- Encourage volunteers to participate in C4C projects.
- Evaluate and suggest revisions of the C4C for board vote.
- Submit annual report to President.
- Manage C4C checking account plus debit card and PayPal. (May want to merge with AHAF general account)
- Publicize significant newsworthy publications through AHAF and all sources available for community and members.
- Actively pursue partners, teachers, parents, associations, companies and organizations interested in promoting cursive handwriting training.
- Work with communications chair to publicize AHAF/C4C events and happenings.
- Work with communications chair for National Handwriting Day campaign.

- Submit reports or articles for the newsletter.
- Advise members of new connections and sponsorships.
- Keep current with Google Alerts (“penmanship,” “cursive,” etc.) and respond when necessary.
- Stay abreast with state legislation regarding re-instating or diminishing cursive.
- Spearhead Cursive is Cool® contests if enough volunteers enlist to sponsor the contests.
- Maintain the C4C website page content and respond to inquiries.
- Manage fees for Campaign for Cursive® and Cursive is Cool® via Arizona State University/Sandra Day O’Connor School of Law and the US Patent and Trademark Office.
- Develop presentations for cursive requests; in-person, chapter meetings and state legislation requests.
- Participate in AHAF conferences.

PRIVILEGES AND REIMBURSEMENTS

100% waiver of conference registration.

Be reimbursed promptly for approved out-of-pocket expenses not covered in the C4C account.

CONTENTS OF FILES

- Records of Cursive is Cool® contests
- Records of financial expenses
- Records and files may be in the form of physical, digital, or electronic records, including content on the AHAF website

WEBSITE MANAGER

Appointed by the president and is a member of the AHAF Board of Directors

THE DUTIES OF THE WEBSITE MANAGER SHALL BE TO

- Maintain AHAFhandwriting.org.
- Regularly ensure that there are no broken links.
- Update Member Directory as new members join or members fail to renew.
- Add certified members to Find-A-Professional Directory as indicated by certification chair.
- Update changes in board of directors and chapters.
- Encourage members to post on the website blog.
- Upload newsletters, board minutes to members-only page.

PRIVILEGES AND REIMBURSEMENTS

50% waiver of conference registration.

Be reimbursed promptly for approved out-of-pocket expenses.

CONTENTS OF FILES

Articles for future newsletters

Graphics files for use in newsletter template

CONFERENCE CHAIR

The conference chair is appointed by the president and becomes a temporary member of the board of directors, commencing with the appointment and continuing until duties are fulfilled.

THE DUTIES OF THE CONFERENCE CHAIR SHALL TO BE

- Along with input by the board prepare a conference budget and coordinate with the treasurer.
- Prepare a calendar of conference activities.
- Appoint off-board committee members if necessary and plan meetings. Committee appointments are without vote on board of directors.
- In the event of an in-person conference, select site, negotiate prices for rooms, menus, refreshments, transportation, amenities, audio/visual needs, etc.
 - Secure a Statement of Understanding from the hotel with a set block of rooms and option for more with a minimal penalty for cancellations or unused rooms. Keep in mind double occupancy rates.
- Select theme and recruit speakers and request abstracts of their topics, photo, and biography.
- Set speaker fees and include in budget.
- Solicit pre- and post-conference workshop/roundtable/panel speakers and topics. Return speakers must present new topic. Private pre/post workshop speakers are responsible for paying for the rental of their meeting rooms.
- Arrange AV equipment necessary for speakers and topics.
- Arrange with venue for web-conferencing needs.
- Prepare a daily conference schedule that includes times for speakers, breaks, meals, business meetings, social events.
- Coordinate bookstore and/or sale of other goods.
- Prepare introductions or assign someone to introduce speakers.
- Arrange for extracurricular entertainment or activities during breaks or at banquet
- Allow time for presentation of awards or recognitions
- Arrange for Annual Business Meeting. All members are encouraged to attend.
- Send confirmation to registrants and keep accurate records of all transactions.
- Consult with communications chair on advertising campaign.
- Supply newsletter editor with program of speakers and topics with registration form to supply members and all interested contacts.
- Submit a post-conference report and financial statement to the board within 30 days of the conference.
- For in-person conference, order materials necessary for registration (programs, name tags, novelties, handouts).
- Set up registration checkpoint, meeting room(s), hospitality suite.

PRIVILEGES AND REIMBURSEMENTS

100% waiver of conference registration.

Guestroom provided at no cost during conference.

CONTENTS OF FILES

Record book, spreadsheet or file for all transactions and receipts

Contract with hotel/vendors

Menu selection and costs

Speaker contracts and topics

Calendar of conference events

Previous conference records

Records and files can be in the form of hard copies, digital, electronic, or on the AHAF website.

AWARDS AND SCHOLARSHIPS

Ad hoc committee, chair appointed by the president to collaborate with the conference chair and the research chair.

THE DUTIES OF THE AWARDS AND SCHOLARSHIPS CHAIR SHALL BE TO

- Serve at the direction of the Board for the period of time necessary to complete the assignment.
- Recognize and reward members who have provided significant service to the field of handwriting analysis with important writings, research studies, leadership, and other inspiring contributions.
- Coordinate with the research chair and submit member nominations with rationales to the board for consideration of the various awards to be presented at the annual conference (The Flandrin-Michon Lifetime Achievement Award is given only when warranted).

PRIVILEGES AND REIMBURSEMENTS OF OPTIONAL APPOINTMENTS

Reimbursement of approved out-of-pocket expenses

CONTENTS OF FILES

Records of duties performed while serving this position.

Records and files can be in the form of hard copies, digital, electronic, or on the AHAF website.

PARLIAMENTARIAN

Ad hoc position appointed by the President. When a parliamentarian is appointed, the parliamentary authority of the organization shall be Roberts' Rules of Order.

THE DUTIES OF THE PARLIAMENTARIAN SHALL BE TO

- Interpret the bylaws when necessary
- Review agenda prior to meeting
- Provide the presiding officer with assistance in applying parliamentary procedures and meeting processes.

PRIVILEGES AND REIMBURSEMENTS OF OPTIONAL APPOINTMENTS

Reimbursement of approved out-of-pocket expenses

CONTENTS OF FILES

Records of duties performed while serving this position.

Records and files can be in the form of hard copies, digital, electronic, or AHAF website.

NOMINATIONS CHAIR

Ad hoc committee. Chairperson is appointed by the president.

THE DUTIES OF THE NOMINATIONS CHAIR SHALL BE TO

- Solicit requests for nominees in the newsletter and email.
- Obtain the consent of nominees and request a bio and photo of each to be published in the issue prior to the election.
- Prepare a ballot that includes all candidates interested in each office and provide it to the secretary.
- Present the slate of officers to membership for vote no less than thirty (30) days prior to Annual Meeting in July of election years. Deliver ballots by email, mail, or the official publication from the editor. Email to the secretary who must count and record all votes.
- Submit report to President. Responsibility of nominations chair is concluded when ballot is counted and presented to the secretary.
- Safeguard organizational records, sample forms and letters and relinquish them to a successor. Records and files may be in the form of hard copies, digital, electronic, or on AHAF website.

PRIVILEGES AND REIMBURSEMENTS

Be reimbursed promptly for approved out-of-pocket expenses

CONTENTS OF FILES

Membership Current roster

Previous reports/ballots from elections

CHAPTER COORDINATOR

Appointed by the president if appropriate, and is a member of the AHAF Board of Directors.

THE DUTIES OF THE CHAPTER COORDINATOR SHALL BE TO

- Act as a member of the Membership committee and work with the vice-president.
- Help establish, promote and advance new chapters and study groups.
- Coordinate with communications chair to support chapters and study groups with advertising in, newsletters, posts, emails, brochures.
- Advocate for funds for speakers, promoting handwriting analysis, increasing membership to National (suggested budget up to \$200 annually per chapter depending on size and nature of chapter needs).
- Contact each chapter quarterly to obtain their agenda, review chapter status and gather information for publication in the newsletter.
- Promote National membership and benefits to chapter members who are not AHAF members.
- Supply each chapter with code of ethics, manual of operating procedures, and bylaws, ensuring operation within the scope of each.
 - Submit annual report to President.
- Safeguard organizational records, sample forms and letters and relinquish them to a successor. Records and files may be in the form of hard copies, digital, electronic, or on AHAF website.

PRIVILEGES AND REIMBURSEMENTS

100% waiver of dues during term beginning with the dues period proceeding appointment.

50% waiver of conference registration for designated representative when AHAF hosts conference

Be reimbursed promptly for approved out-of-pocket expenses

CONTENTS OF FILES

Roster of all chapters, their officers and members

Bylaws, manual of operating procedures, code of ethics

CHAPTER CHARTER PROCEDURES

See Appendix A

CHAPTER PRESIDENT

The president (and treasurer) shall be a national member in good standing, certified by an approved organization and is a member of the AHAF Board of Directors. In the event the chapter president is in process of the AHAF certification program, they would be Acting President until they have passed the examination.

THE DUTIES OF A CHAPTER PRESIDENT SHALL BE

- Elected to a two-year term.
- Preside at each meeting of the chapter board and general meetings.
- Attend quarterly online national board meetings.
- Hold membership meetings at least quarterly with a focus on handwriting analysis and related subjects.
- Develop an annual agenda of programs with the chapter board. Submit agenda to AHAF newsletter editor or chapter coordinator for publication in the newsletter.
- Ensure the AHAF Board, chapter coordinator and newsletter editor are advised of chapter activities.
- Have a general knowledge of parliamentary procedure and develop a manual of operating procedures for each chapter.
- Recruit members and promote AHAF and the handwriting sciences.
- Submit an annual report to President.
- Safeguard organizational records, sample forms and letters and relinquish them to a successor within 30 days of end of term. Files can be in the form of hard copies, digital, electronic, or AHAF website.

PRIVILEGES AND REIMBURSEMENTS

Receive 100% waiver of dues during term beginning with the dues period proceeding election.

Receive 50% waiver of conference registration when AHAF hosts conference.

Be reimbursed promptly for approved out-of-pocket expenses.

CONTENTS OF FILES

Roster of chapter, including officers and members.

Bylaws, manual of operating procedures, code of ethics, official documents of charter.

See Appendix A for information about forming a new chapter.

Appendix A

How to form a AHAF chapter

Requirements

- Five or more people interested in the study of handwriting analysis.
- Meet at least 4 times within the calendar year.
- Be an organized group with a set of bylaws that:
 - Provide the official name of the chapter
 - A mission statement (e.g., “To share, learn, and promote handwriting analysis.”)
 - Describe the offices and duties of the executive board members. The minimum positions are president, vice president/membership chair, secretary, and treasurer. Additional committee members may include other officers such as program director/librarian/social media chair.
 - The president must be certified by AHAF or an AHAF-approved organization (currently BIG, IGAS, ASPG).

Once your group meets these criteria you will need to **complete the following steps:**

1. **Vote** on the matter with your entire group, noting in the minutes of the meeting that the group voted and membership approved the request to charter an official chapter of AHAF.
 2. **Compose an official request** to initiate the Chartering process and send to the chapter coordinator or, if one is not appointed, the membership chair. Include the following documentation:
 - a. Letter of request for charter addressed to the AHAF chapter coordinator stating that the group members have voted and are in agreement that they wish to be chartered as a chapter of the American Handwriting Analysis Foundation.
 - b. A list of proposed officers.
 - c. Proposed chapter bylaws.
 3. The chapter coordinator or membership chair will forward the request to the AHAF board of directors for review.
 4. Once approved, the AHAF vice-president sends you a charter certificate.
 5. The chapter coordinator will make sure the chapter has copies of the following:
 - AHAF Code of Ethics
 - AHAF Manual of Operational Procedures (MOP's)
 - AHAF Bylaws
 - AHAF Standards
- AHAF offers an annual stipend of \$200 to chapters who submit a request by email to the treasurer. The intent is to help with startup costs and payment to speakers.
 - Contact information for AHAF officers is available at the website at <http://www.ahafhandwriting.org/meettheboard>

It is strongly recommended that chapter members be encouraged to join National so they can take advantage of all the benefits and resources AHAF offers to members. Note: Chapter members who are not also members of National do not qualify for reduced fees for conferences or other meetings. Also,

only members are allowed to vote in elections, chapter awards and recognitions, or other such activities. See the website for member benefits at <http://www.ahafhandwriting.org/newmembers>

Requirements for chapter presidents:

1. Be certified by AHAF or another approved organization (currently IGAS, BIG, ASPG).
2. Be an AHAF member in good standing.
3. Encourage and share knowledge of handwriting analysis by holding meetings at least 4 times a year.
4. Uphold the ethics and standards of AHAF and require chapter members to do so, too.
5. Submit two reports annually to national AHAF:
 - a. **Treasurer's report.** Our nonprofit status requires that we file a statement to the IRS that includes chapters' financials. Please report the balance in your treasury to the AHAF treasurer by March 31st each year.
 - b. The **state of the chapter** report is to be submitted to the chapter coordinator by December 31st.
6. Inform the chapter coordinator or membership chair of:
 - a. Contact persons for your chapter and their contact information. These will be the officers you designate to provide meeting updates and information.
 - b. Your meeting schedule.
 - c. Any changes to chapter officers.
7. The job of the chapter coordinator is to help your chapter grow. When chapters share information, each can benefit from the others' experiences.
8. AHAF national membership **dues are waived** for chapter presidents.
9. Chapter presidents are members of the AHAF board of directors and will be notified of board meetings, which are held online quarterly. You are expected to participate whenever possible.

Chapters are autonomous but National is here to help with ideas when help is needed.

AHAF National support

Let the chapter coordinator or membership chair is here to help chapters develop and grow. Let them know how they can help. Here are some of the resources available to you:

- AHAF **brochures are available** by request. You may customize the brochures with a sticker that includes your chapter meeting information.
- **Online study groups.** Our online study group is free to National members. The online chapter offers two free sessions before requiring membership, so all are encouraged to try it out. Online meetings are conducted via Zoom web conferencing. A free account from www.zoom.us is all that is needed. We are happy to help you set up chapter meetings if you wish to use our Professional Zoom account.
- Ask **for ideas in marketing and advertising** for help in publicizing your events to other handwriting analysis newsletters, Facebook pages, and email groups.
 - The chapter coordinator or the communications chair is available to help you create a **Facebook or Twitter Account** if you would like help. We can also help with starting your own **Meet-Up account** (paid for by your chapter) to attract new members.
 - Let the chapter coordinator or communications chair know what program topic you may have covered at your last meeting, books you reviewed, or any topic discussed for inclusion in the national newsletter. Remember to include them in your newsletter distribution or email list.
 - Brag about member or group achievements. We all like to hear about birthdays, anniversaries and

accomplishments, and share in their successes. Share photos in our newsletter, which is distributed to all members. We only know about these events when you share them.

Frequently asked questions:

- **Who may join a chapter?** Anyone interested in learning more about handwriting analysis and wishes to associate with others that uphold AHAF's high standards and ethics, and who are working towards the advancement of their handwriting analysis education.
- **What kind of training is required?** AHAF welcomes persons of all handwriting analysis education and experience as members. We recognize that both gestalt and trait-stroke handwriting analysis can produce similar results, and we encourage members to familiarize themselves with both methods. Note, however, that while we do not subscribe solely to one school or training method, those interested in sitting for the certification examination will need a basic understanding of gestalt handwriting analysis.
- **I am already certified by another group. Will I lose my current certification when I join AHAF?** No, your certifications are yours to keep. AHAF has a list of approved organizations whose training and certification is recognized by us. Those who are certified by those organizations and are members of AHAF National have the option of being listed on our Find-A-Professional page. If members wish to *also* obtain certification through AHAF, we encourage them to apply for our examination.

APPENDIX B

BOARD MEMBER STATEMENT OF AGREEMENT

I, _____ understand that as a member of the Board of Directors of the American Handwriting Analysis Foundation (“AHAF”), I have a legal and ethical responsibility to ensure that the organization does the best work possible in pursuit of its goals. I believe in the purpose and the mission of the organization, and I will act responsibly and prudently as its steward. As part of my responsibilities as a board member:

1. I will interpret the organization’s work and values to the community, represent the organization, and act as a spokesperson.
2. In turn, I will interpret our constituencies’ needs and values to the organization, speak out for their interests, and on their behalf, hold the organization accountable.
3. I will attend at least 75 percent of board meetings, committee meetings, and special events.
4. I will excuse myself from discussions and votes where I have a conflict of interest.
5. I will stay informed about what is going on in the organization. I will ask questions and request information. I will participate in and take responsibility for making decisions on issues, policies, and other matters. I will not stay silent if I have questions or concerns.
6. While I am a member of this board, I will make every effort to vote in every election or survey.
7. I will work in good faith with other board members as partners toward achievement of our goals.
8. If I fail to fulfill these commitments to the organization, I will expect the board president to call me and discuss my responsibilities with me.

The organization is responsible to the board members for:

1. Receiving, without having to request them, quarterly financial reports and an update of organizational activities that allow me to meet the “prudent person” standards of the law (The “prudent person rule,” applied in many legal settings in slightly different language, states that an individual must act with the same judgement and care as, in like circumstances, a prudent person would act.)
2. Opportunities to discuss with the president the organization’s programs, goals, activities, and status; additionally, I can request such opportunities.
3. Helping me perform my duties by keeping me informed about issues in the industry and field in which we are working and by offering me opportunities for professional development as a board member.
4. Responding in a timely and direct fashion to questions regarding how to execute my fiscal, legal, and moral responsibilities to AHAF.
5. Board members will work in good faith with me toward achievement of our goals.

6. If the organization fails to fulfill its commitments to me, I can call on the board president to discuss the organization’s responsibilities to me.

Signed: _____ by _____, Board Member
Date: _____

And _____ by _____, AHAF President
Date: _____