



# The Philadelphia Association of Paralegals

*A Charter Member of the National Federation of Paralegal Associations*

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# PROCEDURES MANUAL

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## ARTICLE 1. INTRODUCTION

The purpose of this Procedures Manual is to provide each Officer, Director and Committee Chairperson with an overview of the operating policies and procedures of the Association. The Articles of Incorporation and Bylaws govern the activities of the Association and, in the event that any procedures adopted by the Association are in conflict with the Articles of Incorporation or the Bylaws, the Articles of Incorporation and/or Bylaws shall take precedence.

Each new Officer, Director and Committee Chairperson shall receive, at the Annual Meeting, a printed copy of the Articles of Incorporation, Bylaws and Procedures Manual. Each Officer, Director and Committee Chairperson is responsible for being knowledgeable of these three documents and following the procedures set forth therein.

## ARTICLE 2. BOARD OF DIRECTORS

2.1 General Duties and Responsibilities. The composition and powers of the Board are controlled by Article V of the Bylaws. To be an effective member of the Board of Directors, it is essential to be dedicated to the cause of the Association. Board members should be clear about the duties of his/her position and match them to his/her interest and available time.

2.1.1 Purpose of the Board. The Board is responsible for carrying out the Association's business in a manner consistent with the Association's Bylaws, Mission Statement and this Procedures Manual.

2.1.2 General Responsibilities of the Board. Each Director serves an important role in carrying out the functions of the Association. The unique roles and perspectives brought by members of the Board benefit the vitality of the Association. Generally, the responsibilities of the Board members are as follows:

- (a) Represent the membership and the interests of the paralegal profession;
- (b) Serve as spokespersons on behalf of the Association;
- (c) Attend scheduled Board meetings and the installation luncheon unless excused by the President;
- (d) Implement the Association's policies and procedures;
- (e) Set the direction of the Association (short and long-term goals);
- (f) Promote interest and active participation in Association activities;
- (g) Be responsive to calls and solicitations from existing vendors;
- (h) Develop future leaders; and
- (i) Encourage volunteer participation.

2.1.3 Standard of Conduct for the Board. Board members are expected to perform their functions in a competent manner in order to protect themselves and the Association against legal liabilities. Remember that Board members of nonprofit associations have the same or similar responsibilities and duties as Board members of for-profit associations or businesses. Under the Standards of Conduct Theory, the legal obligation of individual Board members falls into two categories: (1) duty of loyalty and (2) duty of care. Each category contains a number of concepts:

(a) Duty of Loyalty.

(i) Conflict of Interest. When a Board member is personally interested in a contract or transaction to which the Association is a party, or is indirectly interested because of employment or investment with a person or organization with which the Association is dealing, the Board member must disclose the existence of the interest and describe the nature of the interest to another members before the Board takes any action with respect to the person or Association. The interested member may be counted in establishing quorum but must abstain on any vote taken in which a personal interest exists.

(ii) Disclosure of Conflict. When an opportunity benefiting the Association and a Board member comes to the attention of the Board member, the Board member must first present the information to the Association. Only after the Board has evaluated the opportunity and decided whether to pursue the matter collectively may the Board member pursue the matter for personal interest. If a Board member also sits on the board of another association and a situation arises which would affect both organizations, the Board member is obligated to inform the Board of the conflict of interest that exists and to recuse him or herself from decisions relating to the conflicting matter.

(iii) Duty of Fairness. Where conflicting interests are present, all Board members have an obligation to be fair. This applies to all Board members, regardless of conflict of interest.

(iv) Confidentiality. Board members must treat all matters relating to the Association as confidential until such time as the information is determined or designated as a matter of public records or is a matter of common knowledge. The presumption of confidentiality shall apply to all current information concerning the Board or Association activity.

(b) Duty of Care. Pennsylvania statutes provide that a Board member of a nonprofit corporation shall discharge the duties in good faith, with diligence and care, which an ordinarily prudent person in a like position would exercise under similar circumstances. The definitions are as follows:

(i) In Good Faith – This means acting honestly or in an honest manner. A Board member relying on information, which is known to be untrue, will not be considered to be acting in good faith.

(ii) Diligence and Care – This is an expression of the duty of attention to concerns and activities of the Association as described below.

(iii) Ordinarily Prudent Person – This concept focuses upon the basic attributes of common sense, practical wisdom and informed judgment. The individual is not necessarily one having specialized training or experience in the field of business management, finance, etc., but is thought of as the average person.

(iv) Under Similar Circumstances – This phrase is made up of the following concepts:

(v) Recognition that the nature and extent of a Board member's role will vary depending upon such factors as the size, complexity and location of the Association's activities.

(vi) Recognition that 20-20 hindsight does not apply. Limit the critical assessment of the individual's performance to the time of the action or non-action.

(vii) Recognition that the special background and qualifications a Board member possesses may place greater responsibility on that member – either generally or with respect to the particular matter under consideration.

(c) Duty of Attention. A Board member also has a responsibility to participate actively in the Association's activities by:

(i) Regularly attending meetings.

(ii) Reviewing information. Board members should be furnished with appropriate information regarding each issue requiring Board action. Sufficient information to allow for informed judgment should be available. If such information is not available, concern should be expressed and, if necessary, a delay in action requested. If a delay is not granted, a Board member may then abstain or vote in opposition to the action and ask that the reasons for doing so be recorded in the minutes. Board members are expected to read materials distributed prior to Board meetings.

(iii) Board members may delegate to a committee (i.e., ad hoc) the authority to act, provided that actions taken are subject to the control and direction of the Board. Board members may delegate, but not abdicate, their responsibilities to committee members.

(iv) The Board may rely on information, opinion, reports or statements, including financial statements and other financial data, prepared or presented by: (1) Board members; (2) legal counsel, public accountants or other persons who the Board reasonably believes have professional or expert competence; or (3) a committee of the Board duly designated. The Board is encouraged to examine carefully, through questions, detailed reading and focused discussion, any advice or action on which it proposes to rely. It is important to note that mechanical reliance without critical analysis could negate any presumption of informed judgment

## 2.2 Meeting Attendance Policy.

2.2.1 The Board is required to meet at least once a month at the discretion of the President.

2.2.2 Each Director is required to attend the annual organizational meeting and a minimum of 75% of the regular monthly meetings of the Board in accordance with Section [5.5] of the Bylaws, except as otherwise excused by the President.

2.2.3 Each Director shall notify the President and Secretary prior to the Board meeting if the Director wishes to be excused from the meeting.

2.2.4 Directors should respond to all association-related e-mails within 24 hours. If a Director will be out of the office for more than 24 hours, that Director should (i) notify the President via e-mail prior to departure from the office and (ii) utilize the "out of office assistant" to create a message giving details of the dates out of the office. An "out of office" voice mail message should also be set up.

2.2.5 All meetings of the Board shall be conducted in accordance with *Robert's Rules of Order*.

2.2.6 The Secretary shall notify the Board immediately if any Director has missed more than 75% of the regular monthly meetings pursuant to Section 2.2.4 of this Procedures Manual, and such Director may be removed from the Board. If the dismissal of a Director results in less than five (5) Board members, a Director may be replaced pursuant to Section 5.3 of the Bylaws for filling vacancies on the Board.

2.2.7 A Director shall be deemed to have resigned if such Director does not attend three successive Board meetings and has not notified the President of his/her intention to be excused.

2.2.8 All Directors are expected to attend Board meetings in person in their entirety. If a Director is unable to attend a Board meeting in person, he or she may participate in a meeting of the Board of Directors, or of a committee of the Board of Directors, by means of conference telephone or similar communications equipment by means of which all persons participating in the meeting can hear each other, with the prior permission of the President.

## 2.3 Election of Directors.

2.3.1 Election of Directors shall be in accordance with Article V of the Bylaws.

2.3.2 The term "member in good standing" referred to in Article V of the Bylaws is defined as those members whose dues payments are current, and who are in compliance with the Voting Member category of membership as defined in Article III of the Bylaws. If a Director becomes unemployed during their term, the Director may continue to sit on the Board for the remainder of the calendar year.

2.3.3 If a Director elected at the Fall Meeting to Elect the Board of Directors has not renewed his/her membership in the Association and paid his/her dues on or before the

Organizational Meeting held in January of the following calendar year, and therefore is not in "good standing" as required by the Bylaws, such Director shall not assume his/her position on the Board of Directors of the Association. The Board may fill the vacancy pursuant to Section 5.3 of the Bylaws if the absence of this Director results in less than five (5) Board members.

2.4 Term of Directors. Each Director shall serve for a period of two (2) years, as set forth in Article V, Section 5.2(c) of the Bylaws, or until his/her successor has been selected and qualified.

2.5 Voting Procedures. The Board shall vote in accordance with the Bylaws and the voting procedures set forth in Articles IV and V of the Bylaws, as well as Robert's Rules of Order. Except for the annual election of Officers, the President shall not vote during a regular Board meeting unless the President's vote is needed to break a tie.

### **ARTICLE 3. OFFICERS**

3.1 Duties and Authority. The general duties, authority and terms of office of the Officers of the Association are set forth in Article VI of the Bylaws. The Association strongly recommends that candidates for office meet the requirements set forth by the Nominating Committee, unless waived by a majority vote of the Board. The purpose of these recommendations is to insure that Association officers have the time necessary to carry out their responsibilities and have the experience necessary to understand and fulfill the requirements of their office.

#### 3.2 Miscellaneous Duties.

3.2.1 Board Reports/Correspondence. Each Board member shall copy the President and Secretary on all correspondence using the Association's letterhead.

3.2.2 Review of Annual Tax Return. Each Director is required to review the Association's annual tax return and to notify the President, in writing (can be via e-mail), that they have reviewed the tax return, and indicating whether they have any questions or corrections.

3.2.3 Conflict of Interest Disclosure. Each Director will be required to sign and complete a Conflict of Interest Disclosure Statement annually at the Organizational Meeting as required by the Internal Revenue Service in order to maintain the Association's Section 501(c)(6) status.

3.2.4 Review of Monthly Treasurer's Report. Each Director is required to review the Association's monthly Treasurer's Report, and to obtain and review a copy in advance of any meeting they will miss or are permitted to attend via telephone. If the Director will miss the monthly meeting, they are required to notify the President prior to the meeting, in writing (can be via e-mail) that they have reviewed the report, and indicating whether they have any questions or corrections.

3.2.5 Review of Monthly Minutes. Each Director is required to review the Association's monthly Minutes, and to review a copy in advance of any meeting they will miss or are permitted to attend via telephone. If the Director will miss the monthly meeting, they are



required to notify the President prior to the meeting, in writing (can be via e-mail) that they have reviewed the report, and indicating whether they have any questions or corrections.

3.2.6 Review of Contracts. The Officers of the Association are required to review any contract being considered by the President. Each Officer must notify the President, in writing (can be via e-mail), that they have reviewed the contract, and indicating whether they have any questions or corrections.

3.2.7 Membership/Application Review. The Board of Directors shall, upon the request of the Member Services Committee, review any membership application presented by the Member Services Committee for final determination.

3.2.8 Student Forums. All Directors should participate in at least one annual student forum at any of the local schools offering a paralegal program.

### 3.3 Duties of Officers.

3.3.1 President. The President shall serve in accordance with Section 6.4 of the Bylaws. The President's duties include the following:

(a) Supervise the day-to-day business of the Association to ensure that the business of the Association is accomplished and that the integrity and reputation of the Association remains pristine. This includes final review of all Association reports for NFPA and the Keystone Alliance as well as the Association's quarterly newsletter.

(b) Preside over all Board of Directors meetings and meetings of the Executive Committee.

(c) Submit an agenda to all Directors prior to the next Board meeting.

(d) Act as principal liaison to all national, state and local paralegal organizations in order to:

(i) Promote the interests of the Association; and

(ii) Promote cooperation between the Association and these organizations.

(iii) At the discretion of the Board and if the budget allows, the President may request preapproval of an expense related to these duties.

(e) Serve as the Association's advisor to local paralegal programs when invited; and, if unavailable, to appoint another Director to fulfill the invitation.

(f) Act as primary spokesperson or delegate the role of spokesperson for the Association as the need arises.

(g) Act as an advisor and ex-officio member of all committees.

(h) Review all contracts and submit to Association Officers for approval; execute all contracts on behalf of the Association.

(i) Review all of the Association's publications, website and broadcast emails.

(j) Writes the President's column for the quarterly newsletter and President's introduction for the education conference brochure.

(k) Act as a signatory on Association bank accounts.

(l) Act as a Board Advisor during the year following presidency.

3.3.2 First Vice President. First Vice President shall serve in accordance with Section 6.5 of the Bylaws. The duties of the First Vice President shall include:

(a) In the absence of the President, the First Vice President will assume the duties of the President, including all responsibilities described in Section 3.3.1 above. The First Vice President must also be willing to assume the duties of the President in the event of a vacancy.

(b) Assist the President in the administration of the day-to-day business affairs of the Association, as deemed necessary by the President.

(c) Supervise the day-to-day tasks and responsibilities of employee(s)/volunteers of the Association, including recruitment of volunteers, to be approved by the President.

(d) Act as a signatory on Association bank accounts.

(e) Attend meetings of the Executive Committee when invited by the President.

3.3.3 Second Vice President. The Second Vice President shall serve in accordance with Section 6.5 of the Bylaws. The duties of the Second Vice President shall include:

(a) Assume the duties of the President in the absence of the President and the First Vice President. The Second Vice President must also be willing to assume the duties of the First Vice President in the event of a vacancy.

(b) Supervise all Committee Chairs and meet with them at least twice annually.

(c) Supervise ad hoc committees concerned with policy and bylaw revisions.

(d) Update the Procedures Manual.

(e) Respond to requests for information concerning Association policies and prepare written statements at the request of the President.

(f) Act as a signatory on Association bank accounts.

(g) Attend meetings of the Executive Committee when invited by the President.

3.3.4 Secretary. In addition to the duties set forth in Section 6.6 of the Bylaws, the Secretary's duties shall include the following:

(a) Prepare, distribute, collect, and tabulate all written consents of members and the Board on matters voted upon, and promptly announce results.

(b) Update the Bylaws, when amended, including filing with the appropriate governmental agency, if necessary, and distribute amended documents to the Board.

(c) Submit minutes of the prior Board meeting to the President for review no later than two weeks following the meeting.

(d) Attend meetings of the Executive Committee when invited by the President.

3.3.5 Assistant Secretary. The duties of the Assistant Secretary shall include:

(a) Assume the duties of the Secretary in the Secretary's absence. The Assistant Secretary must also be willing to assume the duties of the Secretary in the event of a vacancy.

(b) Assist in the day-to-day duties of the Secretary, as deemed necessary by the Secretary.

(c) Monitor activities of the Secretary on an ongoing basis in order to be prepared to assume the duties of the Secretary when necessary.

(d) Prepare scholarship/awards chart twice annually (PAP, NFPA, LAT, ATLA, etc.) and circulate to Board Members and Committee Chairs in accordance with the Association's PRMC and NFPA's annual award announcements.

3.3.6 Treasurer. In addition to the duties set forth in Section 6.7 of the Bylaws, the Treasurer's duties shall include the following:

(a) Supervise the maintenance and accuracy of all financial records.

(b) Serve as the primary liaison to the Association's accountant.

(c) Supervise the filing of U.S. annual informational returns and other annual reports as required.

(d) Supervise preparation of a complete financial report as soon as practicable after fiscal year books are closed.

(e) Maintain ongoing balances of each budget and present a Treasurer's Report to all Directors on or before each monthly meeting.

(f) Attend meetings of the Executive Committee when invited by the President.

3.3.7 Assistant Treasurer. The duties of the Assistant Treasurer shall include:

(a) Assume the duties of the Treasurer in the Treasurer's absence. The Assistant Treasurer must also be willing to assume the duties of the Treasurer in the event of a vacancy.

(b) Assist in the day-to-day duties of the Treasurer, as deemed necessary by the Treasurer.

(c) Monitor activities of the Treasurer on an ongoing basis in order to be prepared to assume the duties of the Treasurer when necessary.

(d) Draft a complete financial report as soon as practicable after fiscal year books are closed for review by the Treasurer.

3.4 Bank Accounts.

3.4.1 Generally. The Association shall obtain a savings account, checking account, and other accounts as may be determined necessary by the Board of Directors.

3.4.2 Signatories.

(a) There shall be two signatories on all bank accounts, certificates of deposit, etc.

(b) The signatories on the bank accounts shall be the President, First Vice President and Second Vice President, and other Officers as the Board of Directors may determine from time to time.

(c) No signatory may sign a blank check at any time for any reason. Any signatory violating this Section 3.4.2(c) shall be removed as a signatory on all accounts.

#### **ARTICLE 4. BOARD ADVISOR**

4.1 Generally. The Board Advisor is the immediate past President of the Association and as an ex-officio non-voting member of the Board, unless elected as a Director.

4.2 Duties and Responsibilities. The Board Advisor provides continuity for ongoing activities and has the following duties:

4.2.1 Provide historical and background information to assist the Board in decision-making.

4.2.2 Assist in special projects and assume such other responsibilities as directed by the Board.

## **ARTICLE 5. BOARD LIAISONS**

5.1 NFPA. The Board shall annually elect two liaisons for representation with the National Association of Paralegal Associations.

### 5.1.1 Duties of Primary Representative.

- (a) Act as the Association's representative to NFPA.
- (b) Attend and participate at NFPA's annual meeting (currently in different U.S. locations from approximately Thursday night – Sunday afternoon).
- (c) Attend all Region IV conferences for NFPA at the direction of the Region IV Director (currently at locations as far away as Pittsburgh and Virginia).
- (d) Cover NFPA conference calls or arrange with Secondary Representative, President or other directors to participate and share notes from such calls.
- (e) Review and finalize the bimonthly NFPA report and share with the President at least three days before the due date. Responsible for timely submitting the report and disseminating "Inside" articles and news to all Directors.
- (f) Inform the general membership about national issues and positions through written newsletter articles.
- (g) Consult with the Board of Directors and then present resolutions and ideas at the regional and national meetings of NFPA and vote at those meetings as the Association's NFPA representative.
- (h) Respond to requests for information from NFPA or any of its member associations.
- (i) Coordinate award nominations for annual NFPA awards.

### 5.1.2 Duties of Secondary Representative.

- (a) Assume the duties of the Primary Representative in the Primary Representative's absence. The Secondary Representative must also be willing to assume the duties of the Primary Representative in the event of a vacancy.
- (b) Remain apprised of the activities of the Primary Representative in order to assume the duties of the Primary Representative when necessary.

(c) Accompany the Primary Representative to Region IV meetings (currently as far away as Pittsburgh and Virginia) and conferences (currently in different U.S. locations from approximately Thursday night – Sunday afternoon) as the Association's budget permits and as deemed appropriate by the Primary Representative.

(d) Draft the Association's bimonthly NFPA report and submit it to the NFPA Primary Liaison at least one week before the due date.

5.2 Keystone Alliance of Paralegal Associations. The Board shall annually elect two liaisons for representation with the Keystone Alliance of Paralegal Associations. It is preferred that liaisons have the Pa.C.P. credential – or apply within six (6) months after election for the credential -- and remain in good standing at all times.

5.2.1 Duties of Primary Representative.

(a) Act as the Association's representative to the Alliance.

(b) Attend the quarterly meetings of the Alliance scheduled at the discretion of the Chair (currently held throughout the state) in their entirety, or making sure the Secondary or PAP President or other Officer can attend on PAP's behalf. Keystone Alliance meetings are generally held on Saturdays between 8:30 a.m. – 3:30 p.m.

(c) Review and finalize the quarterly Keystone Alliance report and share with the President at least three days before the due date. Responsible for timely submitting the report and disseminating Alliance news to all Directors.

(d) Inform the general membership about state issues and positions through written newsletter articles.

(e) Promote Pa.C.P. credential.

(f) Respond to requests for information from the Alliance or any of its member associations.

5.2.2 Duties of Secondary Representative.

(a) Attend quarterly meetings of the Alliance scheduled at the discretion of the Chair (currently held throughout the state) , in their entirety with the Primary Representative, or in his/her place. Keystone Alliance meetings are generally held on Saturdays between 8:30 a.m. – 3:30 p.m.

(b) Assume the duties of the Primary Representative in the Primary Representative's absence. The Secondary Representative must also be willing to assume the duties of the Primary Representative in the event of a vacancy.

(c) Remain apprised of the activities of the Primary Representative in order to assume the duties of the Primary Representative when necessary.

(d) Accompany the Primary Representative to meetings as deemed appropriate by the Primary Representative.

(e) Promote the Pa.C.P. credential.

(f) Draft the Association's quarterly Alliance report and submit it to the Alliance Primary Liaison at least one week before the due date.

5.3 Philadelphia Bar Association. The President is the Association's Philadelphia Bar Association liaison, serving as a non-voting member of the Bar's Board of Governors. If, due to extraordinary circumstances, the President is unable to fulfill these duties, which include attending all Board of Governors meetings (currently held monthly) and related activities, the President shall designate an alternate, to be approved by the Board. If the President or liaison is not already a Bar member, he/she agrees to join the Philadelphia Bar according to the Bar Association's Bylaws – at their personal expense. The liaison must also perform pro bono and community service and report that service annually to the Bar upon request. If considering an alternate, the Board shall also take into account the Philadelphia Bar Association's preference for consecutive terms.

5.3.1 Duties of Primary Representative.

(a) Act as the Association's representative to the Bar, promoting the interests of the Association and cooperation with the Bar.

(b) Attend monthly Bar meetings and any other meetings at the request of the Chancellor.

(c) Sign Bar's confidentiality statement.

(d) Secure the incoming Chancellor for swearing in the Association's new Board at our January luncheon and coordinate the Oath

(e) Attend at least one Bar Association quarterly luncheon annually, at his/her personal expense (preferably the December luncheon featuring the incoming Chancellor).

(f) Attend at least one additional Bar Association function annually, whether free or at his/her personal expense.

(g) Inform the general membership about non-confidential issues and positions through written newsletter articles.

(h) Respond to requests for information from the Bar staff, officers or committee chairs.

5.3.2 Duties of Secondary Representative.

(a) Assume the duties of the Primary Representative in the Primary Representative's absence. The Secondary Representative must also be willing to assume the duties of the Primary Representative in the event of a vacancy.

(b) Remain apprised of the activities of the Primary Representative in order to assume the duties of the Primary Representative if necessary.

(c) Accompany the Primary Representative to meetings or events as deemed appropriate by the Primary Representative.

(d) Assist the Primary Representative with requests for information.

5.4 The Legal Intelligencer.

5.4.1 Duties.

(a) Serve as liaison with editorial staff.

(b) Coordinate monthly authors amongst Board members; share writing guidelines.

(c) Receive and review articles prior to submission. Coordinate any questions or concerns with the President.

(d) Submit article and current Association calendar. Also, when Education Conference Brochure is ready, submit cover photo to them with brief info about conference for inclusion on our paralegal page.

**ARTICLE 6. BOARD COMMITTEES**

6.1 Executive Committee.

6.1.1 Duties.

(a) Hold meetings at a time and place designated by the President, if necessary.

(b) Review activities of Association committees and handle special requests.

(c) Hold special meetings as deemed necessary by any member of the Executive Committee.

(d) In the absence of the Executive Committee, its duties shall be assumed by the Board.

6.2 Nomination Committee.

6.2.1 In addition to the duties set forth in the Bylaws at Section 5.11(b), the duties of the Nominating Committee shall include:

(a) Provide notice to voting members of upcoming Board of Directors election, in accordance with the Bylaws.

(b) Update and distribute proxy forms to voting members.



(c) Collect and tabulate all proxy votes and verify membership of absentee voters.

(d) Distribute ballots to voting members in attendance on the day of the Board elections.

(e) Tabulate all votes for the Board of Directors and announce results to membership via weekly e-mail blast.

## **ARTICLE 7. OTHER COMMITTEES**

### **7.1 Generally.**

7.1.1 Each Committee Chair should respond to or disseminate all Association-related e-mails within 24 to 48 hours. If a Committee Chair is out of the office for more than 24 hours, he/she should utilize the "out of office assistant" and create a message giving details of the dates out of the office. An "out of office" voice mail message should also be set up.

7.1.2 Structure. Committees are governed by Article V of the Bylaws. Ad Hoc, Standing Committees and Special Committees/Task Forces may be established by the Board of Directors.

7.1.3 Standing Committees. Standing committees are perpetual and continual unless otherwise dissolved. Standing committees may be divided into subcommittees when necessary.

7.1.4 Ad Hoc Committees. Ad Hoc committees are established for a particular purpose and shall have a life span of no longer than one year unless otherwise specified in the resolution creating such committee.

7.1.5 Special Committees/Task Forces. Special Committees are established for short-term projects and are created by Board resolution.

7.1.6 Chairpersons. Committees may be chaired by one or two individuals who are members of the Association in good standing at the time of their election/appointment and who remain in good standing during their tenure. Two chairs shall be known as "Co-Chairs" with equal standing and who agree to inform each other of any independent activity. Committee Chairpersons are appointed by the Board for a one-year renewable term.

7.1.7 Members. Each committee shall include one or more of the Directors of the Association or such other person as the Board of Directors may determine. Members of committees must be members of the Association in good standing during their service on committees.

7.1.8 Non-members. Non-Association members may attend one Association committee meeting annually at no-charge; Chairpersons are responsible for collecting \$10 for each additional meeting and surrender the funds to the Association's Treasurer for deposit into the Association's bank account. The \$10 may be applied toward membership.

7.1.9 Meetings. Each committee shall meet at least quarterly at a time and place designated by the Chairperson. Chairpersons are responsible for getting RSVPs and contact information for each meeting in the event of a cancellation, as well as a sign-in sheet and taking minutes during each meeting. Chairpersons are encouraged to obtain sponsors who will provide lunch or snacks for each meeting. When applicable, Chairpersons shall request and obtain CLE credit from NFPA and the Keystone Alliance and coordinate CLE certificates with the Education Committee Chairperson(s).

7.1.10 Reports.

(a) Committee Chairpersons are required to submit an annual report and Budget (see 7.1.12) to the President at least one week prior to the Annual Meeting and are required to attend – or send a committee representative – to attend the Annual Meeting in person to present the report and budget. Failure to attend the Annual Meeting may result in the Board's dismissal and replacement of that Chairperson.

(b) Committee Chairpersons are required to attend all Education Committee meetings, or to send a Committee member in his/her place.

(c) Committee Chairpersons are required to submit sign-in sheets to the Member Services Chair and written reports/minutes summarizing their meetings to the 2nd Vice President prior to their next meeting.

(d) Committee Chairpersons are required to submit committee notes to the newsletter Editor for the Association's quarterly newsletter on or before the Editor's deadline.

(e) Committee Chairpersons are required to submit notices of committee meetings and announcements for the weekly e-mail blast on or before the deadline required by the e-mail blast chairperson.

(f) Committee Chairpersons shall make recommendations for committee activities.

7.1.11 Communications. All committee correspondence should be on Association letterhead. The President and Secretary should be copied on all correspondence. The Board encourages Chairpersons to prepare a handwritten Thank You for each sponsor and speaker.

7.1.12 Budget.

(a) Each Committee Chairperson shall submit a proposed budget to the President along with his/her annual report. The budget should take into consideration reasonable needs such as postage and special project expenses anticipated by the committee. The Board of Directors will advise each committee as to the amount allocated to the committee. Funds will be budgeted for committees and allocated according to each committee's need and in the best interests of the Association and its members.

(b) Any funds received by any committee for any reason from any source (e.g., non-member attendance fees or sponsor fees) shall be reported and surrendered

to the Treasurer for deposit in the Association's bank account. Such funds will be distributed to the committee by the Treasurer on an as needed basis.

#### 7.1.13 Reimbursements.

(a) Requests for reimbursement must be submitted to the Treasurer in memo or other form prescribed by the Board of Directors, accompanied by any supporting documentation. Expenses in excess of an approved budget must be preapproved by the Board.

(b) Invoices received from vendors for services rendered must be preapproved by the Board and shall be reviewed and negotiated by the Committee Chairperson and forwarded to the Treasurer for payment once finalized.

(c) All invoices should state the name of the Committee in care of the Association, and should be e-mailed to the Treasurer as well as mailed/delivered to the P.O. Box address of the Association.

(d) There will be no cash advances for Association-related travel. Submission of receipts for expenses to the Treasurer will be reviewed and a check issued promptly. Note that certain expenses will not be covered by the Association, including but not limited to the following:

Movies or Entertainment	Alcohol
Room Service	Dry Cleaning
Spa Services	Fuel

(e) If a car rental is necessary for Association travel, a request should be made to the Board at least one (1) month before date of travel. If a quicker car rental is necessary, the Chairperson should contact the President or Treasurer immediately to discuss the situation and obtain approval. It is important when traveling to have Board members' home and/or cell information. If a Chairperson's vehicle is being utilized for Association business, he/she will be reimbursed based upon the current IRS standard mileage reimbursement rate allowance. The Association will not reimburse a member for expenses directly related to filling up the gas tank for a member's personal vehicle.

(f) If a Chairperson or Committee member is traveling on behalf of the Association, he/she shall advance all monies for travel and submit receipts for reimbursement. The President may consider granting an exception for extenuating circumstances upon request, which must be preapproved by the Board.

7.1.14 Files. Each Chairperson shall maintain a file of Committee activities. All pertinent files should be transferred to any new Chairperson(s) assuming responsibility for the Committee on or before December 20<sup>th</sup>.

7.1.15 Planning. In planning committee activities, consideration should be given to setting certain goals for the year and concentrating energies on accomplishing those goals. Recommendations from the previous Committee Chairperson(s) and resolutions adopted at the final committee meeting of the year should be considered in determining committee activities.

7.1.16 Publicity.

(a) All publicity for committee events shall be coordinated with the E-mail Blast Chairperson.

(b) A representative from each committee shall provide an article for publication in the Association newsletter at least once annually.

7.1.17 Subcommittees. Each Committee Chairperson may establish subcommittees as deemed necessary by the Chairperson, and appoint temporary subcommittee chairpersons. The Board should be notified of the establishment of all subcommittees and the appointment of subcommittee chairpersons. Such establishment of subcommittees and Chairpersons are subject to Board approval.

7.2 Education Committee.

7.2.1 Duties (in addition to those in Section 7.1).

(a) Establish specialty section committees and appoint specialty section Chairpersons, subject to Board approval.

(b) Oversee "brown bag" luncheon seminars conducted by specialty sections and provide CLE certificates when applicable.

(c) Plan and coordinate the Association's annual one-day continuing education event.

(d) Collect and review seminar materials from other paralegal associations.

7.2.2 Annual Education Conference.

(a) Coordinate site visits and a proposed date to be presented to the Board for approval.

(b) Oversee brochure content, layout and distribution.

(c) With the assistance of Committee Chairs, select prospective seminar topics.

(d) With the assistance of Committee Chairs, recruit seminar speakers.

(e) With the assistance of Committee Chairs, select luncheon keynote speaker.

(f) Writes Education Chair acknowledgement and thank you for the conference brochure.

(g) Prepare press releases.

- (h) Coordinates purchase of speaker gifts and keynote honorarium.
- (i) Organize room monitors and registration volunteers.
- (j) Prepare evaluation questionnaires.
- (k) Prepare and send thank you letters to speakers.

### 7.3 Job Bank Committee.

#### 7.3.1 Duties.

- (a) May appoint employment-seeker contact person.
- (b) My appoint prospective employer contact person.
- (c) Prepare job listing format.
- (d) Respond to questions from interested applicants.
- (e) Forward membership applications to non-members seeking to use the services of the job bank.
- (f) Promptly turn over contact information for employment agencies wishing to advertise their positions to the Public Relations and Marketing Committee.

### 7.4 Member Services Committee.

#### 7.4.1 Duties (in addition to those in Section 7.1).

- (a) Screen all membership applications for compliance with the membership requirements as set forth in Section 6.7.2 below.
- (b) Present membership applications to the Board for final determination, if necessary.
- (c) Coordinate issuance of annual membership cards and "welcome" letters to new and/or renewing members.
- (d) Coordinate annual membership drive.
  - (i) Prepare renewal forms in September; organize mailing of renewal forms to current members in October.
  - (ii) Coordinate mailing of "failure to renew" notices.
  - (iii) Coordinate update of the Association's promotional brochure with Public Relations and Marketing Chairperson(s).

(iv) Recruit individuals from law firms, corporations and schools to act as firm representatives.

(v) Work with PRMC to promote law firm sponsorship (10+ members).

(e) Oversee responses to requests for membership information.

(f) Oversee computerization of membership data and coordinate that data with the Association's Website Coordinator, NFPA and the Philadelphia Bar Association.

(g) Provide membership lists to each committee Chairperson of those members who have indicated an interest in a committee his/her membership application.

(h) Coordinate labels for the most current membership list with the Newsletter Committee Chairperson(s) on or before the editorial deadline for each issue.

(i) Prepare birthday announcement list for the quarterly newsletter.

(j) Keep monthly listing of membership totals sorted by membership category.

#### 7.4.2 Association Membership Requirements.

(a) Compliance with criteria set forth in Article III of the Bylaws.

(b) Continuing compliance with the Pennsylvania Bar Association's Rules of Professional Conduct enacted by the Pennsylvania Supreme Court and adopted by the Philadelphia Bar Association and the National Federation of Paralegal Association's (NFPA) Model Code of Ethics in their current forms or as may be adopted, amended or revised in the future.

#### 7.5 Military Outreach (f/k/a Legalman Project).

##### 7.5.1 Duties.

(a) Promote and collect goods for shipping to our servicemen and women.

(b) Coordinate letter writing efforts with Pro Bono and Community Service Chairperson(s).

#### 7.6 Newsletter Committee.

##### 7.6.1 Duties (in addition to those in Section 7.1).

(a) Establish deadlines for each issue annually.

(b) Work with the Public Relations and Marketing Committee to solicit advertising for each issue and placement of advertisements for each issue.

- (c) Solicit and collect articles and photographs for each issue.
- (d) Writes an Editor's column for the quarterly newsletter.
- (e) Establish student coordinator(s) for Student Corner articles (coordinate with PDC).
- (f) Recruit proofreaders for each issue.
- (g) Submit rough draft to proofreaders upon receipt.
- (h) Make all corrections and prepare newsletter for layout and submission to the designer/printer.
- (i) Coordinate enough copies of each issue for current membership, appropriate sponsors and upcoming student forums.
- (j) Submit electronic copy of each newsletter to the Website Coordinator for submission to NFPA and the Keystone Alliance for publication on their respective websites.

7.7 Paralegal Certification Ambassador (must be an RP or CRP).

7.7.1 Duties (in addition to those in Section 7.1).

- (a) Promote NFPA's exams and credentials: PACE/RP and PCCE/CRP.
- (b) Facilitate study groups.
- (c) Coordinate Association scholarships for RP and CRP exams.
- (d) Track all Association members obtaining certifications and present pins at quarterly luncheons and/or Education Conference luncheon.
- (e) When applicable, coordinate nomination for NFPA's annual Paralegal Certification Ambassador Award.

7.8 Pro Bono - Community Service Committee.

7.8.1 Duties (in addition to those in Section 7.1).

- (a) Establish projects for participation by the committee and Association members.
- (b) Coordinate volunteers for pro bono and community service activities, including students from local schools offering paralegal programs.
- (c) Coordinate volunteer nights with each organization and supervise all volunteers.

(d) Promote reporting of all hours by members to NFPA.

(e) Assist Military Outreach Committee Chair to coordinate letter writing campaign(s) for servicemen and women with Project Chairperson(s).

(f) Encourage participation in Philadelphia Bar Association pro bono and community service activities, such as Law Day, as well as the Young Lawyer's Division.

(g) Coordinate announcements, promotion and selection for the Association's annual Pro Bono Award (October). All nominations are to be mailed to the Association's P.O. Box. Submit winning candidate nomination information to the Board for approval before notifying the winner.

(h) Prepare nomination of Association candidate for NFPA's annual individual pro bono award. When applicable, prepare nomination of the Association for NFPA's annual association pro bono award.

(i) Update Association Pro Bono-Community Service Brochure.

## 7.9 Professional Development Committee.

### 7.9.1 Duties (in addition to those in Section 7.1).

(a) Update School Directory on a regular basis by requesting information from paralegal schools/programs.

(b) Update Career Guide on the Association website.

(c) Coordinate announcements, promotion and selection for the Association's annual Joan Weldon Scholarship (July). All nominations are to be mailed to the Association's P.O. Box or submitted to the Association office via .pdf format by e-mail. Submit winning candidate nomination information to the Board for approval before notifying the winner.

(d) Organize Speakers' Bureau for School Events.

(i) Solicit volunteers from Board of Directors and committee members.

(ii) Coordinate speaking engagements with local paralegal programs.

(iii) Update and distribute Association promotional materials.

## 7.10 Programs Committee.

### 7.10.1 Duties (in addition to those in Section 7.1).

(a) Coordinate venue(s) and proposed quarterly luncheon dates to be presented to the Board for approval.



(b) Negotiate and review contracts for submission to the President.

(c) Coordinate January swearing in of new Board with President and Bar Association Liaison. Coordinate April Association Awards with Public Relations and Marketing Chairperson(s). Coordinate July Joan Weldon Scholarship with Professional Development Committee Chairperson(s). Coordinate annual Pro Bono Award with Pro Bono-Community Service Chairperson(s).

(d) Coordinate speakers and menu for quarterly luncheons.

(e) Prepare flyer for E-mail Blast, as well as mass electronic invitations.

(f) Review luncheon reservations and meal selections.

(g) Coordinate speaker gifts.

(h) Coordinate luncheon agenda with the President.

(i) Organize special events.

#### 7.11 Public Relations and Marketing Committee.

##### 7.11.1 Duties (in addition to those in Section 7.1).

(a) Secure annual sponsors – both vendors and law firms – as well as annual Education Conference sponsors and newsletter advertisements.

(b) Keep chart of sponsors and potential sponsors updated with contact information and when-what they sponsored.

(c) Confirm with Treasurer whether funds for ads in the quarterly newsletter have been received and assist Newsletter Chairperson(s) with ad placement in quarterly newsletters.

(d) Prepare list of current sponsors for inside cover of each newsletter.

(e) Keep up-to-date list of current sponsors for all U.S. mailings (newsletter, NFPA publications and education conference brochure).

(f) Assist Education Conference Chairperson(s) with ad placement in annual brochure.

(g) Follow up with Education Conference sponsors after the conference via e-mail/survey for feedback on their experience.

(h) Coordinate vendor placement at annual Education Conference and prepare Vendor Bingo forms. Serve as liaison to vendors that day.

(i) Assist Member Services Chairperson(s) and Pro Bono-Community Service Chairperson(s) with updating the Association's promotional brochures.

(j) Update and distribute solicitations for annual Association Awards (April). All nominations are to be mailed to the Association's P.O. Box. Coordinate voting within your committee and submit candidates to the Board for approval before notifying the winners.

(k) Provide the Association office with updated list of named sponsors who are to receive newsletters and NFPA mailings as necessary.

(l) Prepare and send thank you letters to advertisers.

## 7.12 Social Media Committee.

### 7.12.1 Duties.

(a) Draft content for website and social networking platforms.

(b) Use creative means to plan, organize and implement a range of social media programs.

(c) Contribute to and regularly update external social media sites.

(d) Monitor -- on a daily basis -- social media for trafficking communications related to the Association.

(e) Create, develop and manage content for the Association's website to increase our online presence to potential members, vendors, sponsors and other affiliates.

(f) Create and distribute the Association's weekly email blast, PAP Happenings.

(g) Convey a sense of community and build our following based on content and mutual sharing.

(h) Update and maintain the Association's Social Media Policy.

## 7.13 Strategic Planning Committee.

### 7.13.1 Duties.

(a) Prepare Mission Statements for the Association and each separate committee; review Mission Statements annually and update as necessary.

(b) Make suggestions regarding new committees/procedures.

(c) Review the function of each committee and make suggestions regarding undertakings/procedures.

(d) In the absence of the Strategic Planning Committee, its duties shall be assumed by the Board.

7.14 Technology Committee.

7.14.1 Duties (in addition to those in Section 7.1).

(a) Work with current Association technology sponsors for non-sales presentations at Technology Committee meetings.

(b) Assist Education Committee Chairperson(s) with coordinating all technology needs at the annual Education Conference.

(c) Work with the Public Relations and Marketing Chairperson(s) to secure a vendor to provide technological support at the annual Education Conference.

**ARTICLE 8. ADMINISTRATIVE ASSISTANT/VOLUNTEERS**

8.1 Duties. This outline of duties is not intended to be all-inclusive. There may be additional tasks requested of the administrative assistant from time to time, as circumstances warrant.

8.1.1 Messages.

(a) Answer office telephone and monitor messages on both office voice mail and e-mail.

(i) Forward messages to appropriate Board or committee chair.

(ii) Messages requesting confirmation of information, or applications for membership should be handled and followed upon on by assistant, with direction from the First Vice President, President or Board Advisor.

(iii) Messages may be checked from office or home, as needed.

8.1.2 U.S. Mail.

(a) Pick up mail from Post Office Box.

(i) Mail should be forwarded to appropriate Board or committee chair by U.S. mail, or hand-delivery, unless otherwise requested or arranged in advance.

(ii) Bills and checks should be forwarded to the Treasurer as soon as possible.

8.1.3 Office Administration.

(a) Create and maintain filing systems, including scanning, checking, renaming, moving and shredding everything possible. (Note that the Association Articles of Incorporation and all original documentation must be maintained indefinitely). Minutes may be shredded upon confirmation of at least one electronic and one backup copy.

(b) Respond to informational and membership requests.

(c) Assist with quarterly luncheons and annual Education Conference, including coordinating registrations, meal selections and course selections, as well as check-in assistance on the day of the event.

(d) Assist Member Services Chairperson(s) and Public Relations and Marketing Chairperson(s) with current mailing lists for all members and sponsors.

(i) Hard copies of all current year membership applications should be kept on file in the Association office for two years, unless electronically scanned with at least one backup copy.

(e) Provide mailing lists and labels and assist with mailings as requested.

(i) Board members and committee chairs requesting mailings will provide 2-3 days prior notice (minimum).

(ii) Draft flyers as needed for events. Information for flyers to be provided by appropriate Board member or committee chair.

(iii) Flyers for events should be saved on office system for future use.

(f) Order office supplies as needed.

(i) Requests for supplies should be sent to First Vice President or President for approval.

(ii) Maintain potential member and law firm supervisor contact mailing list.

(iii) All such other activities that may be requested.

(g) Attend Board of Directors meetings as needed.

(h) Assist in assembly of orientation materials & membership renewals at start of the year, working with Board of Directors and Membership Services Committee Chairperson(s).

(i) Assist with obtaining signatures for checks, as requested by the Treasurer.

(j) Assignments and requests for assistance should be sent via e-mail or telephone calls directly to administrative assistant. The First Vice President is to be copied on all e-mail requests for assistance and/or informed of all work requests.

(k) Complete and submit timesheets, with detail, on a weekly basis.

(i) Timesheets are to be provided to the Treasurer and First Vice President. Hard copies should be kept in office files.

(ii) Hours per week should be no more than 20 hours. Additional hours will be approved, if needed to complete special assignments. Approval should be requested from the First Vice-President.

(iii) Requests for time off or schedule changes should be directed to the First Vice President.

## **ARTICLE 9. SOCIAL MEDIA**

9.1 All Board Members and Committee Chairs are expected to adhere to the Association's Social Media Policy Addendum hereto. Briefly, you are required to make every effort to post responsibly when communicating online (no typos or slang). This includes refraining from derogatory comments about anyone, including members, vendors or other Board Members and Committee Chairs. Failure to comply, to remedy any problem brought to an offender's attention, or repeated abuse could result in immediate dismissal.

## **ARTICLE 10. AMENDMENTS**

10.1 All suggested revisions to this Manual must be submitted to the Second Vice-President, who will review the proposed changes for submission to the Board of Directors. Officers, Directors and Committee Chairpersons may submit proposed changes to those sections of the Manual for which they are responsible. Each Committee Chairperson is responsible for keeping the section of the Manual pertaining to his/her committee current.

**ADDENDUM TO THE PHILADELPHIA ASSOCIATION OF PARALEGALS'**  
**PROCEDURES MANUAL (Approved December 2013)**  
**SOCIAL MEDIA POLICY**

This policy applies to all Board members and Committee Chairpersons of the Association.

1. Introduction. The Association maintains a website (<http://www.philaparalegals.com>) and social media accounts with LinkedIn, Twitter and Facebook.
2. Participation. The Association strongly encourages Board members and Committee Chairpersons to “connect” with us on LinkedIn, “follow” us on Twitter and “like” us on Facebook. Your input is vital to improving the visibility of the Association so that we can attract new members, sponsors and other affiliates.
3. Guidelines for Use of Social Media. The Association understands that social media can be a fun and rewarding way to share your life and opinions with family, friends and co-workers around the world. However, use of social media also presents certain risks and carries with it certain responsibilities. To assist you in making responsible decisions about your use of social media, we have established these guidelines for appropriate use of social media.
4. Definitions; Responsible Use. In the rapidly expanding world of electronic communication, social media can mean many things. Social media includes all means of communicating or posting information or content of any sort on the Internet, including to your own or someone else’s web log or blog, journal or diary, personal website, social networking or affinity website, web bulletin board or a chat room, whether or not associated or affiliated with the Association, as well as any other form of electronic communication. The same principles and guidelines found in this Addendum and three basic beliefs apply to your activities online. Ultimately, you are solely responsible for what you post online. Before creating online content, consider some of the risks and rewards that are involved. Keep in mind that any of your conduct that adversely affects the Association, other Board members or Committee Chairpersons, our members or sponsors may result in disciplinary action up to and including removal from the Board or Committee.
5. Posting Guidelines.
  - (a) Know and follow the rules. Carefully read these guidelines and ensure your postings are consistent with these policies. Inappropriate postings that may include discriminatory remarks, harassment, and threats of violence or similar inappropriate or unlawful conduct will not be tolerated and may subject you to disciplinary action up to and including removal from the Board or Committee.

- (b) Be respectful. Always be fair and courteous to members, vendors, sponsors or affiliates of the Association. Also, keep in mind that you are more likely to resolve complaints by speaking directly with the person with whom you have a dispute rather than by posting comments to a social media outlet. Nevertheless, if you decide to post complaints or criticism, avoid using statements, photographs, video or audio that reasonably could be viewed as malicious, obscene, threatening or intimidating, that disparage members, vendors or sponsors, or that might constitute harassment or bullying. Examples of such conduct might include offensive posts meant to intentionally harm someone's reputation or posts that could be construed as discriminatory on the basis of race, sex, disability, religion or any other protected status.
  - (c) Be honest and accurate. Make sure you are always honest and accurate when posting information or news, and if you make a mistake, correct it quickly. Be open about any previous posts you have altered. Remember that the Internet archives almost everything; therefore, even deleted postings can be searched. Never post any information or rumors that you know to be false about the Association, fellow Board members or Committee Chairpersons, our members, vendors, sponsors or affiliates.
  - (d) Post only appropriate and respectful content. Maintain the confidentiality of the Association's private or confidential information. Do not post internal reports, policies, procedures or other internal business-related confidential communications. Do not create a link from your blog, website or other social networking site to an Association website without identifying yourself as a Board member or Committee Chairperson of the Association. Express only your personal opinions. Never represent yourself as a spokesperson for the Association or any of its officers or directors unless directed to do so by the President and the Social Media Coordinator. If the Association is a subject of the content you are creating, be clear and open about your position. If you do publish a blog or post online related to the work you do or subjects associated with the Association, make it clear that you are not speaking on behalf of the Association. It is best to include a disclaimer such as "The postings on this site are my own and do not necessarily reflect the views of The Philadelphia Association of Paralegals."
6. Monitoring of Social Media Sites. Be advised that all of the Association's social media sites are monitored 24 hours a day, 7 days a week. Malicious, obscene, threatening or discriminatory remarks, harassment, and threats of violence or similar inappropriate or unlawful conduct will be immediately removed and you will be removed as a LinkedIn connection, Twitter follower and/or Facebook friend of the Association. In addition, you may be subjected to disciplinary action up to and including removal from the Board or Committee.