



Colorado Association for Gifted and Talented

Affiliate Handbook:

**For New, Emerging, and Sustaining
Affiliates**

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IMPORTANT NOTICE

This Manual is intended to assist the reader in the creation and operation of an affiliated entity. The experiences, training and education, and reflections of CAGT members are set out in the Manual as recommendations.

For these reasons, it is important to note that:

- ❖ Your circumstances may be unique, and the recommendations and statements in the Manual may not be entirely suited for your situation. For this reason, CAGT cannot and does not have any liability for the contents of this Manual.
- ❖ This Manual is intended to provide recommendations regarding certain legal issues that you should consider. You should make any decisions that have legal implications after consultation with your own legal advisor.
- ❖ CAGT reserves the right to amend or discontinue any support that the Manual states it will provide for affiliates. Such changes shall be without any liability on the part of CAGT.
- ❖ CAGT reserves the right to amend, add to, or remove any portion of this Manual at any time, and it will not have any liability for anyone's reliance on provisions that are changed or removed.

WELCOME!

As the Executive Director and on behalf of the Colorado Association for Gifted and Talented (CAGT), I want to welcome you to the CAGT family! Since you have accessed this notebook and are reading this letter, I can assume you are interested in becoming an Affiliate of our state organization. It is my personal mission to ensure that all of our Affiliates are an integral part of our organization so that CAGT represents our gifted community across Colorado. My hope is not only to grow and strengthen our current Affiliates, but to create new partnerships in all corners of the state.

As you may know, CAGT is a statewide, nonprofit organization of parents, educators, students, and community members. It is CAGT's belief that all humans have an inherent right to develop their full potential. Our organization fosters an understanding of all gifted children and their exceptional needs, and advocates for appropriate education and affective support through partnerships with educators, families, students, administrators, legislators, and the general public.

As a CAGT Affiliate, you and your members can help support the objectives of CAGT by developing educational programs for parents, families, students, and communities, and by attending CAGT-sponsored events in order to receive state and national information relating to the field of gifted education. All new Affiliates receive start-up funds, and established Affiliates receive annual funding based on membership in order to help finance the programs/events in your community.

Since CAGT works directly with our state legislators, your input will help us send important legislation to the Capitol. Your voice will be heard on issues that impact our gifted students' education.

As members, you will receive our quarterly newsletter, *Kaleidoscope*, which contains information and best practices about gifted children, as well as our monthly *Happenings* emails, which will inform you of events throughout Colorado and let you share what's happening in your area. These are also great networking tools among the Affiliates!

All Affiliate presidents are members of the CAGT Board of Directors and are encouraged to attend our general board meetings (either in person or remotely) as often as possible. Your president can tell us about successes and challenges from your region and help us make decisions impacting the laws and programming that affect gifted education. Your input and insights are welcomed and valued in helping our organization grow stronger in supporting our gifted children.

The intent of this handbook is to provide information to help establish and sustain your Affiliate and to get your program, customized for your area, underway and supported.

We at CAGT want to embrace what Affiliates do and need ... We are excited to help you on this journey!

Sincerely,



Nanette Jones
Executive Director
Colorado Association for Gifted and Talented (CAGT)

CAGT'S GUIDING PRINCIPLES

Gifted children hold the promise of innovation and creativity that will shape our world. Our moral imperative at CAGT is to strengthen the culture, attitudes, and learning environments so that gifted children will continue to enrich our world and nation as we face a changing future.

CAGT'S MISSION

Because all human beings have an inherent right to develop their full potential, the purpose of this organization is to foster the understanding of all gifted children and their exceptional needs and to advocate for appropriate education through partnerships with educators, families, administrators, legislators, and the general public.

CAGT, guided by its core beliefs, uses various strategies and tools, including extensive collaborative partnerships, to promote change and sustain good practices.

Affiliate organizations are encouraged to use CAGT's mission as a touchstone to guide their work, as it highlights the following key elements and emphases of the statewide organization:

- supporting development of the **potential** of gifted individuals
- fostering **understanding** of giftedness
- **advocacy**
- pursuing **partnerships** that extend throughout the educational and community contexts in which we live and work.

CAGT's Vision statement expands upon CAGT's Mission, providing a forward-thinking perspective and describing the strategies it uses to impact the broader world. In short, CAGT's Vision intends to ensure that gifted children grow socially, emotionally, and academically in order to become well-adjusted, contributing members of society. You can find CAGT's entire Vision statement on the CAGT website:

<https://www.coloradogifted.org/about/vision-mission/>

Affiliates are a vital part of this work. CAGT Affiliates are “the boots on the ground” that support connections, in particular with parents, across the state. Affiliates respond to questions, provide resources, and assist in problem solving at the local level. CAGT strives to collect feedback from Affiliates to inform implementation of effective policies and to support Affiliates in their efforts to coach families and others in positive advocacy.

CAGT AS PART OF A LARGER NETWORK

CAGT does not stand alone in this work, but joins its Affiliate organizations in creating a network of relationships and affiliations. CAGT's reach not only spans Colorado, connecting official Affiliate groups and supporting various initiatives focused on gifted children, but also extends through the country to the organizations prominent in other states and to the national sphere through the National Association for Gifted Children (NAGC).

NAGC is a national nonprofit based in Washington, D.C., that intends to support people and organizations that enhance the lives of gifted children through education, advocacy, community building, and research. NAGC lends a voice to national advocacy and policy issues--and links vibrant state associations and advocates. While NAGC does not formally coordinate state-level organizations, it does serve as an overarching supporter of advocacy organizations throughout the U.S. and strives to impact national policy and practice.

Your Affiliate is part of a wider effort to nurture gifted children and to serve those who care deeply about them!

For more information and to gain greater insight into NAGC's strategic vision and recent board actions to support change, see:

www.nagc.org

www.nagc.org/about-nagc/goals-priorities

PURPOSE AND PROMISE OF AN AFFILIATE

What is an Affiliate?

At CAGT, “Affiliates” are official partner organizations that address local concerns, but are linked to CAGT’s broader, statewide mission and are supported by CAGT in serving the needs of the gifted.

Official Affiliates adhere to CAGT’s policies and guidelines, but they differ from each other in the needs they find in their local communities, the projects they take on, the audiences they serve, and the goals they hope to achieve. All are eligible to receive financial support from CAGT.

CAGT aspires to have Affiliates in all parts of Colorado, so you might imagine the different contexts that these Affiliates represent. An urban Affiliate might exist in a very different environment from a rural one. Differences might span school and district structures, the number of families involved or the proximity of expert speakers, or even the ability to gather educators, families, and students in one room. Some Affiliates are created and run primarily by parents, while others are comprised largely of educators. One commonality: Affiliates typically bring together a variety of people and interests.

Ultimately, CAGT’s Affiliate Partnership Program hopes to support Affiliates of all shapes and sizes. As part of that effort, CAGT and its Affiliates create a network that links families, students, educators, and others across the state to our legislators in Denver and to the professionals at the Colorado Department of Education (CDE), setting the stage for the policies and practices that impact the lives of the gifted.

Why Create an Affiliate?

If you are drawn to advocate for the needs of the gifted, you might be motivated by a desire to:

- ❖ build community among families and educators of gifted children
- ❖ support families and educators in understanding the needs of gifted students
- ❖ support enrichment activities for gifted children
- ❖ provide professional development for families, educators, and other community members
- ❖ help solve problems and provide productive solutions
- ❖ assist in providing general resources
- ❖ or something else!

If your region has various initiatives in these interest areas, you might be able to join existing efforts. But if you can’t find a group of like-minded others--or aren’t finding the organizations and opportunities you seek--you might feel compelled to take the lead and start a new Affiliate. We’d welcome you!

FIRST STEPS IN CREATING AN AFFILIATE

Before getting too far along in the creation of your Affiliate, CAGT recommends you take time to explore ideas and identify common goals with your colleagues. Keep in mind that communities differ and that each community has different relationships with partners, including school districts. CAGT recognizes this. As a CAGT Affiliate, you should evaluate your individual needs and resources to determine your own direction within CAGT's guidelines. For example,

- ❖ Some Affiliates may be invited to work cooperatively with schools and districts, perhaps in advisory capacities, giving a voice to issues of giftedness.
- ❖ Some Affiliates establish themselves as self-standing organizations, separate from their local schools and school district, and connect with many different partners--or none at all.
- ❖ Some groups provide enrichment opportunities for children. Some emphasize programming for parents and/or educators, sponsoring speakers or workshops on topics related to gifted education or high potential students.

Regardless, as you begin to translate your ideas into an organization, we recommend you reflect on the following questions to help structure your organization and define your mission, goals, and initial activities:

- ❖ Why do you feel compelled to do this?
- ❖ What stakeholders do you want to draw in and serve?
- ❖ What activities might fill a need and make a difference in your local community?

As you answer the above questions, we encourage you to:

- ❖ Take time to reflect on your own purpose and intentions.
- ❖ Assess your community's needs, and determine which you want to address. Prioritize.
- ❖ Take stock of your community's resources, and begin to establish a network of partners and friends. Build bridges.
- ❖ Consider various structures for your proposed organization.
- ❖ Consider the types of activities you might like to pursue and the programming you might like to offer.

Finally, don't feel like you have to accomplish everything all at once. Accept a manageable pace and process!

MINIMUM REQUIREMENTS AND GUIDELINES FOR AFFILIATES

Each community is unique; however, all CAGT Affiliate activities must align with CAGT efforts to ensure consistent purpose and relevance to giftedness and advocacy statewide. The following guidelines and requirements are not meant to be overwhelming, as CAGT will support you during your Affiliate's journey. We've included page numbers/hyperlinks to areas of this handbook with more information about these topics.

Minimum Requirements to become a CAGT Affiliate Organization

❖ [Board of Directors](#)

- Your board must be composed of a minimum of three (3) members who meet at least once a year. For example, these might be a president, secretary, and treasurer.

❖ [Membership](#)

- All Affiliate board members must be active CAGT members at all times, and at least three (3) members of your Affiliate must be members of CAGT. Your active CAGT members might be one and the same as your board members, especially during the start-up phase of your Affiliate.
- Keep in mind that for active Affiliates, members receive dual membership with CAGT. When paying for a membership through the CAGT website, your supporters merely need to select your Affiliate from the drop-down menu during the registration process.

❖ [Bylaws](#)

- You must create and submit your bylaws to CAGT. CAGT must then approve them prior to granting your official Affiliate status.
- Affiliate bylaws serve your Affiliate's needs, but must also align with CAGT bylaws.
- Your bylaws must contain an Affiliate dissolution provision for turning in all remaining assets to CAGT if your Affiliate were ever to close.
- Any amendments to Affiliate bylaws need to align with CAGT bylaws and be re-submitted to CAGT upon local Affiliate approval.

❖ [Operations](#)

- Your organization will be an Affiliate of CAGT. CAGT provides great flexibility in how an Affiliate operates; however, the Affiliate must **not** violate any of CAGT's bylaws.

❖ Documents required for submission to CAGT prior to Affiliate approval:

- Affiliate bylaws (pre-approved by CAGT; see above)
- Annual Statement of Understanding (with names and signatures of board of directors)
 - This Statement of Understanding outlines essential policies and practices required by CAGT. Executive board members will sign and submit this document annually to reaffirm the board members' understanding and agreement with the terms of the partnership.
- Initial member roster
 - This initial roster might be very simple and comprised of your founding members.
- Agenda or Minutes from a board meeting
 - This will validate your activities in Year 1, even if small, and may document a meeting prior to gaining official Affiliate status. You will continue to provide minutes from at least one board meeting in subsequent years to confirm your Affiliate's ongoing operation.
- Treasurer's report
 - Initially, this will be a proposed budget for Years 1 and 2. In subsequent years, you

will submit a treasurer's report as well to confirm your financial standing.

- Any dues collected for CAGT membership
 - Affiliates should guide local constituents to the CAGT website to register for or renew membership through the CAGT association membership system. All online membership registrations will then be tracked by the CAGT staff and used for calculating the Affiliate Partnership Program annual stipend.
 - Affiliates may accept cash or check at the local level without using the online system, but CAGT will have no record of these transactions until the Affiliate provides CAGT with member contact information. Once member information is provided, CAGT will include these members in communications and in the Spring stipend accounting. More details about the [Affiliate Partnership Program](#) follow in this handbook.

Guidelines on Your Affiliate's Responsibilities to CAGT:

The responsibilities below signify that we're in this endeavor together. As an Affiliate and Affiliate board member, you have the responsibility to abide by CAGT policies and to join us in the shared work. We welcome you at our events, encourage you to support our initiatives, and delight in your interest to join CAGT committees when you are able. When you aren't able, please consider ways you can extend our reach to your part of the world.

- ❖ Become CAGT members.
 - <https://www.coloradogifted.org/membership/benefits-of-membership/> (Membership Information)
- ❖ Participate in and/or volunteer during CAGT events.
 - <https://www.coloradogifted.org/events/conference/> (CAGT Annual Conference)
 - <https://www.coloradogifted.org/events/legislative-day/> (CAGT Legislative Day)
- ❖ Align Affiliate goals/mission/bylaws with CAGT/NAGC goals/mission/bylaws.
 - <https://www.coloradogifted.org/about/vision-mission/> (CAGT Mission/Vision)
 - <https://www.coloradogifted.org/about/bylaws/> (CAGT Bylaws)
 - <https://www.nagc.org/about-nagc/who-we-are> (NAGC Mission)
 - https://www.nagc.org/sites/default/files/Regulations_Policies/NAGC%20Regulations.pdf (NAGC Bylaws)
 - <https://www.nagc.org/about-nagc/goals-priorities> (NAGC Goals/Priorities)
- ❖ Educate local area about giftedness and related resources.
 - <https://www.coloradogifted.org> (CAGT Resources page)
 - <http://www.cde.state.co.us/gt/> (CDE Office of Gifted Education)
- ❖ Be an active part of CAGT Leadership/Committee efforts.
 - <https://www.coloradogifted.org/about/board-members/> (CAGT Board Members & Committees)
- ❖ Develop relationships with other CAGT members/Affiliates.
 - <https://www.coloradogifted.org/cagt-affiliates/affiliate-contact-info/> (CAGT Affiliate Listing)
- ❖ Develop relationships with local/state/national educational/legislative leaders and peers.

CAGT SUPPORT FOR AFFILIATES

CAGT believes in supporting Affiliates by meeting you where you are. The list below is a starting point for what CAGT can offer, but your Affiliate may not need all of these supports--or might need something different. CAGT welcomes Affiliates to raise topics or issues outside of this list to help solve problems, to build productive processes, and to help raise awareness of needs across the state.

CAGT will support Affiliates by providing:

- ❖ a mentor to every new Affiliate
- ❖ start-up funds for new Affiliates (\$500 or pro-rated Affiliate Partnership Program funding, whichever is higher)
- ❖ annual funding contribution for all Affiliates based on membership numbers and compliance
- ❖ statewide legislative support relevant to gifted and talented issues
- ❖ tips on questions about organizational structures
 - 501(c)3 vs. non-501(c)3
 - insurance
 - fundraising vs. grant writing
 - district collaboration vs. private independent entity
- ❖ initial event planning ideas
- ❖ lessons learned from other Affiliates
- ❖ samples of active Affiliate bylaws, articles of incorporation, etc.
- ❖ a list of resources for students, parents/families, educators, community
- ❖ access to grant funds through the Affiliate Grant Program, new in 2019
- ❖ access to the CAGT Speakers Bureau, which lists local and statewide experts who can present to parents and educators
- ❖ additional CAGT expertise on various topics

This handbook will provide more information on these topics as well as tips for where to explore related issues. Keep reading!

THE NITTY GRITTY--PRACTICAL ADVICE FOR ESTABLISHING YOUR AFFILIATE

This section provides information regarding initial and ongoing activities to consider as you form your Affiliate. The checklist in the Appendix refers to parts of this section to help guide you on your journey.

Mission, Vision, and Purpose

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Defining the purpose, mission, and vision of your organization is a valuable exercise, essential to the bylaws you'll create and submit to CAGT and useful in grounding your initial efforts. It will also be critical to establishing a nonprofit organization if you choose to become one. Statements associated with goals, including mission and vision statements, reflect the purpose of your organization and your motivations for creating it.

Your *mission statement* will articulate your goals and define what you hope to achieve right now.

Your *vision statement* will focus on the future and what you envision your organization will be like, what impact it might have in the long-term, and how your environment might be improved by your existence.

❖ Resources for more information on Mission and Vision:

- https://www.diffen.com/difference/Mission_Statement_vs_Vision_Statement
- <http://www.brandingbusiness.com/blogs/what-comes-first-vision-or-mission>
- www.shrm.org

Tips and Models for Expressing your Mission, Vision, and Purpose:

❖ Ground your organization in your Mission and Vision prior to moving forward with “doing stuff.”

Taking action, getting things on the calendar, and holding events feels good and signals progress. Without good grounding, however, your efforts can seem--or might actually become--scattered. Especially if your organization is small and volunteer-based, you may have to make tough decisions about where to focus within a sea of good ideas, and your volunteers may have to work independently with little guidance. Strong, clear mission and vision statements provide an anchor to help keep everyone on track, to promote an organizational culture consistent with your values, and to remind everyone of the goals your programming supports.

❖ Write Vision and Mission statements that are easy to understand and convey.

Bright people often excel at complexity. Overly complex statements, however, can run contrary to communicating your message. If outsiders can't easily identify your purpose, support can be harder to come by. If insiders--especially volunteers with precious time and energy--can't clearly see how their contributions align with your goals, they might meander down wrong paths or lose motivation. Crisp messages will help draw your intended audience and align your activities with your goals.

➤ Resources:

- Consider some examples of vision and mission statements:
<https://blog.hubspot.com/marketing/inspiring-company-mission-statements>.
- Find other Affiliates' Vision and Mission statements via the Affiliate tab on the CAGT website (<https://www.coloradogifted.org/cagt-affiliates/affiliate-contact-info/>).

❖ Cultivate a culture of positivity.

While CAGT Affiliates show tremendous variability, the most successful organizations often share some common features. Among these are the ability to propose potential solutions--not just expose problems--and to ground efforts in constructive engagement rather than only in criticism. Establishing these ideas in your mission and vision statements will reinforce a culture that values them.

❖ The National Association for Gifted Children has additional wisdom to add to this discussion:

- <http://www.nagc.org/sites/default/files/Parent%20CK/Starting%20and%20Sustaining%20a%20Parent%20Group.pdf>

Objectives and Goals (Short-/Medium-/Long-):

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Developing a new Affiliate can be time-consuming as well as rewarding, so you may feel compelled to take shortcuts and move on to high profile activities--especially if you've succeeded in crafting strong mission and vision statements. Successful organizations, however, do schedule time to define practical goals with care and intention, reflect on successes and challenges, and evaluate progress.

Goal-setting can take many forms, but needn't be elaborate. Business and organizational literature will discuss "objectives" and "goals" with detailed discussions, but don't get stuck on grandiose notions. Do pause for a moment to consider what your goals for the short term might be, even if they're something as simple as "Hold two parent meetings this year," "Have attendance of at least ten people at our November presentation," or "Distribute two newsletters that compile resources and calendar items in our region."

❖ Resources for more information on goal-setting:

- <https://blog.hubspot.com/marketing/goals-vs-objectives>

Tips and Models:

❖ **Start your goal-setting by analyzing your community's needs.**

Goals will look different, depending on where your Affiliate is located, your community's needs, your defined constituents, and what you decide to take up as your cause. Consider these factors first to anchor your goals in your unique landscape.

MIGHT YOUR COMMUNITY NEED THE FOLLOWING?

- ◆ information about the needs of gifted and talented students
- ◆ information about the types of academic programs that serve gifted students well
 - ◆ advocacy for increased support for gifted and talented students
 - ◆ enrichment programming and resources for gifted and talented students
 - ◆ increased awareness of giftedness generally
 - ◆ professional development for teachers
- ◆ linkages among those who advocate and support gifted and talented students
- ◆ a forum for parents to discuss social, emotional, and academic needs of their children

❖ Incorporate your passions.

When you set your goals, make sure that you strike a balance between pragmatism and passion. If there are particular issues that you want to address, prioritize them.

Many people focus solely on building the organization when they set goals and do whatever they can to that end. However, you can't neglect activities that bring you and your colleagues joy and are the basis for why you came together in the first place, things like hosting student programming such as CSI (Crime Scene Investigators') Day or a series of gifted educational talks for parents and the community at large. Incorporate fuel for your personal fires!

❖ Make your goals reasonable and attainable.

When you're exploring possible goals, unleash your imagination and ambition, put your reservations aside, and dream big dreams. Before you've firmly decided on a goal, however, make sure that it is realistic and achievable in the time you have set for yourself.

To help set realistic goals, use [SMART Goal Setting](#) strategies, also recommended by the Colorado Department of Education in creating Advanced Learning Plans (ALPs): Make sure that your goals are Specific, Measurable, Attainable, Relevant, and Time-bound. Information on using SMART goals can be found at:

https://www.mindtools.com/pages/article/newHTE_87.htm

<https://www.cde.state.co.us/gt/alpguidance>

❖ General, yet important, goals to incorporate in your first six months include the following:

- Select a name and possibly a logo to support your identity.
- Establish Affiliate bylaws and structure.
- Determine your Affiliate's Executive Committee/Board of Directors, including President, Secretary, Treasurer/Membership, Publicity/Communications or others you deem necessary.
- Plan an *introductory general meeting and choose a meeting structure*. Some Affiliates have chosen a topic and speaker of certain appeal and wrapped a business meeting around that event. Having a speaker address effective advocacy, for example, and working collaboratively with

schools and administrators might not only be interesting to your audience, but might set the tone for your organization's work.

- Consider whether you would like to establish yourself as a non-profit organization. If so, educate yourself about that process and begin.

❖ **Avoid "negative" goals.**

How you think about a goal can influence how you feel about it--and whether you achieve it at all. Negative goals are emotionally unattractive, which makes it hard to focus on them. Reframe negative goals so that they are positive: You may be surprised by the difference it makes!

For instance, many people strive to "lose weight." However, the goal is negative: focused on what you don't want--your weight. A positive reframing is to say you want to "get healthy." Likewise, you might set the negative goal to "make the District direct more resources to gifted education." You can reframe this as "collaborate with the District to bring best practices to the classroom for gifted and all other kiddos" or "compile research and information packets on the benefits of acceleration for distribution to stakeholders."

❖ **Make sure everyone in your organization feels ownership over your goals.**

Encourage everyone to share ideas and opinions in the goal-settings process and share responsibility for participating in both setting and achieving goals. Ensure everyone understands and has buy-in with the objectives and goals you have chosen.

❖ **Give yourself ample time to complete projects.**

How often has a task or project taken longer than you thought? Probably more times than you can count! If you don't estimate goal completion time accurately, you can end up discouraged when things take longer to achieve than you thought they should. One strategy is to pad your timelines to account for inevitable delays and setbacks, especially in the beginning when you might not be familiar with the people, processes, and systems that you'll need to get things done. If you build extra time into your estimate, you won't have to readjust if things don't go as planned, and you can be happily surprised if you reach your conclusion early.

❖ **Review your progress.**

Sometimes it can feel like you aren't making much progress, especially if you have set challenging goals. That's all the more reason to take stock of everything you've accomplished on a regular basis. Set small intermediate goals, celebrate positive steps, evaluate your efforts--successes and challenges--and analyze what you need to do to keep moving.

Also take opportunities to update your goals, based on your learning or new information. Have your priorities changed? Do you need to reserve extra time for a particular activity? Goals are never set in stone, so don't be afraid to amend them.

❖ **Appreciate your failures as growth opportunities.**

No matter how hard you work, you will fail to meet goals from time to time. We've all been there, and we know it's inevitable. In fact, many of us who have gifted children in our lives make it a point to emphasize failure as an opportunity for growth. Failures can contain lessons that can change your life positively if you have the courage to learn from them. Don't let perfectionism hinder your progress or temper your enthusiasm.

Don't be too upset if you fail to achieve your goals. Take note of where you went wrong, and use that knowledge

the next time around.

Organizational Structure

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As implied by our discussion so far, CAGT Affiliates are organized in different ways, depending on the needs and contexts of various groups, individuals, and communities. Many factors affect organizational structure:

OPTIONS: BASED ON CONSTITUENTS AND PARTNERS

- ❖ Some Affiliates grow from the interests of families to become family-based and -serving organizations. These groups are likely to have structures and systems that accommodate family lifestyles.
- ❖ Other Affiliates take advantage of district-wide initiatives and resources and become housed in local public school organizations, such as districts.
- ❖ Some of these Affiliates with public school district support emphasize professional development for teachers and have greater leadership support from local educators. These groups are likely to have structures and systems that align with school calendars, working adults, and public school features.
- ❖ Other Affiliates bridge the two, with parents and educators both taking on leadership roles, providing resources, and drawing on expertise within their different realms.

OPTIONS: INFORMAL AND FORMAL

- ❖ Some Affiliates remain informal organizations. This might look like a handful of parents who are less formally connected, with a less rigid organizational structure, and who all contribute in a less structured way to the group. This type of group might not have a 10-year plan, but might be very successful in addressing near-term goals.
- ❖ Some Affiliates embrace formal structures that lead them to become more formally recognized entities in their local communities. Some find it useful or necessary to become non-profit organizations, which we will discuss further below.

Choose a structure that is consistent with your interests and those of your likely participants, with your mission and vision, and with the coalitions you've been able to build so far. Your structure should support your goals and be sustainable.

❖ **Resources for more information:**

- National Association for Gifted Children (2011). *Starting and sustaining a parent group to support gifted children*. Waco, TX: Prufrock Press.
<http://www.nagc.org/sites/default/files/Parent%20CK/Starting%20and%20Sustaining%20a%20Parent%20Group.pdf>)
- <http://www.businessdictionary.com/definition/organizational-structure.html>

Tips and Models:

❖ **Consider whether to become a non-profit organization.**

While some CAGT Affiliates have become nonprofits, others have not. Some Affiliates have determined that the administration of the non-profit status seems too great and complicated for their tastes and resources. Others are merely inclined to keep things simple and fluid.

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Those Affiliates that do opt for becoming non-profit organizations find themselves engaging both State and Federal processes, for example, by registering with the Secretary of State’s office. While the paperwork and legal and financial responsibilities may seem daunting, the benefits might appeal to you. Financial contributions from supporters can be tax deductible, and nonprofits are sometimes able to apply for grants that aren’t available to organizations without that designation. Formal nonprofits are also sometimes seen as more long-term players in the landscape and, because there are some oversights and reporting requirements for nonprofits, are seen as respectable and professional.

See the Appendix for one Affiliate’s tips for establishing 501(c)3 status.

➤ **Resources for more information:**

- Colorado Secretary of State:
<https://www.sos.state.co.us/pubs/charities/charitableHome.html>
- Colorado Nonprofit Association
<https://www.coloradononprofits.org/knowledge/faq/how-do-i-start-nonprofit-organization>
- Community Resource Center <https://crcamerica.org/resources/nonprofit-startup-resources/>
- Colorado Revised Nonprofit Corporation Act
--<https://altitude.law/wp-content/uploads/2018/10/Colorado-Revised-Nonprofit-Corporation-Act.pdf>
--<https://www.ochhoalaw.com/a-manager-s-guide-to-the-colorado-revised-nonprofit-corporation-act-other-statutes>
--<https://www.csbj.com/2004/06/18/an-overview-of-the-law-of-colorado-nonprofit-corporations/>
--<https://leg.colorado.gov/sites/default/files/images/olls/crs2017-title-07.pdf>

❖ **New organizations need to be able to adapt.**

As an organization develops, it is not uncommon that the initial structure eventually needs modification, from gentle tweaking to a substantial overhaul. How much the organization needs might depend on factors such as leadership, desired sustainability, goals, evolving relationships, or regulatory compliance. Periodic review by leadership, coupled with membership and/or partner feedback, will help develop and sustain a successful organization. In short, adapt!

Additional information about common organizational mistakes can be found on page 13 of the previously referenced NAGC resource in this section.

Bylaws

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Bylaws are the rules and regulations that provide a framework for the operation of an organization. They set the stage for how well an organization is run and create a contract between an organization and its members. Organizations have bylaws because they want to maintain consistency in operations and to communicate organizational rules so that internal disputes, inefficiencies, and conflict can be avoided.

Bylaws are also a requirement for becoming a CAGT Affiliate and must be consistent with [CAGT bylaws](#). In essence, for Affiliates, bylaws define basic rules of management for both your membership and for CAGT. Please

refer to the earlier section, [Minimum Requirements and Guidelines for Affiliates](#).

❖ **Resource for more information:**

- <https://legal-dictionary.thefreedictionary.com/Bylaws>

Tips and Models:

❖ **All governing documents should be reviewed annually and updated as needed.**

As organizations develop and even after they become fully functional, governing documents, including bylaws, need to be periodically revisited. This activity should ensure that bylaws are current and that the organization remains in compliance with state law, CAGT requirements, and the organization's intent.

Leadership Structure

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Affiliates will require some sort of leadership structure to help hold the organization accountable to the approved intent/purpose, goals, fiscal responsibility, and operational transparency. The organization's articles of incorporation, in addition to bylaws, help define the expectations/job descriptions of a board and/or committees. Having bylaws and articles of incorporation in place will also help with the non-profit status application process, if at some point, an Affiliate chooses to move in that direction.

❖ **Resources for more information:**

The following link provides leadership guidance for non-profits; however, a lot of the leadership tenets hold true for any organization.

- <https://careertrend.com/executive-committee-vs-board-directors-nonprofit-33563.html>
- *The Nonprofit Board Answer Book: A Practical Guide for Board Members*. BoardSource, Jossey-Bass, 2012, San Francisco.

Tips and Models:

❖ **On providing leadership during organizational formation**

During the initial organizational formation, a temporary or steering committee may be considered to lead efforts until the organization is fully functional. Initial actions of the steering committee could include, but are not limited to:

- Select a temporary chairperson.
- Discuss issues, the need for organization, the structure of your organization, benefits you hope to gain, and any possible activities.
- Determine a name for your organization. Because a name gives shape to a group, choose one that is inclusive of both families and educators and even perhaps other stakeholders.
- Discuss goals, objectives, and priorities.
- Do an inventory of others who might join your Affiliate, and make a list of helpful resources.
- Begin developing an organizational framework, including long- and short-term goals.

❖ **On providing leadership after the organization is up and running**

Most Affiliates set up a Board of Directors, which may consist of a president, vice president, treasurer and secretary. Their responsibilities should be noted in the bylaws/articles of incorporation. Some Affiliates select a board structure that includes committees and chairs in addition to an executive board. Tasks for which this entire board of directors is responsible include:

- Governance--leading the organization and coordinating the mechanisms that transfer leadership, such as nominations and election processes
- Fiduciary--approving an annual budget and expenditures such as speakers' fees
- Making decisions and recommendations to the gifted community
- Setting long- and short-term goals
- Developing best practices to strengthen efforts
- Supporting legislative initiatives by communicating with CAGT and about CAGT-aligned goals

You are also likely to make mistakes, especially if leading this type of organization is new to you, but have no fear. The fact that numerous resources exist indicates you're not alone. The resource below discusses governance mistakes you might be on the verge of making--but would likely want to avoid:

- <http://charitylawyerblog.com/2009/10/05/top-15-non-profit-board-governance-mistakes-from-a-legal-perspective/#ixzz5MgDPnUCI>

Membership

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Recruiting others to join your Affiliate can be a challenging task, but the paths of many other Affiliates and of CAGT itself can lead you to helpful strategies. Prepare for powerful work: New members need to be recruited, and existing members engaged, to ensure and to retain a supportive and invested membership body.

Unfortunately, just identifying a target audience and communicating general updates does not guarantee an instant community of informed and involved individuals--to say nothing of "members" who pay dues to support your organization. "Membership," as a multifaceted endeavor, should benefit from multiple organizational processes. You will need time to build name recognition, to implement programming, to craft the benefits of formal membership, and to develop communication strategies that let people know about these things. As you pursue your mission, your Affiliate's identity should take shape, become evident to observers, and draw people to your initiatives.

Who and What is Membership, you ask?

A "member" is a person who has paid membership dues (\$40 for 2019) to an Affiliate and/or CAGT. Annual dues allow a person dual membership in both a local Affiliate and the state-wide CAGT, with the membership year aligning roughly with the academic year, September 1 - August 31. Ideally, a person will pay and log personal information online via the CAGT website, selecting your Affiliate from a convenient drop-down menu. Affiliates can also collect dues in cash or check form and forward information to CAGT.

Often, a core group of Affiliate members will derive from attendees at the CAGT conference each October. CAGT membership is automatic with conference registration, so if your Affiliate is listed in the drop-down menu on the CAGT registration system--and if registrants know to assign themselves to an Affiliate--you should draw memberships from any conference participants who have selected your organization as their Affiliate.

“General members” are regular individuals who pay annual dues to support your Affiliate and have voting rights within your organization. They may or may not attend any programming you host, and they may or may not serve on your board or volunteer in other ways. However, **all Affiliate board members are required to become CAGT/Affiliate members.** Active Affiliate presidents automatically become part of the CAGT board of directors and should try to attend CAGT board meetings, at least occasionally, to link your locality to CAGT’s initiatives.

What’s the Benefit of Membership?

Keep in mind, too, that, according to CAGT guidelines, Affiliate programming should be open to both members and non-members--embracing the entire gifted community. In this way, membership can be viewed as less an entry fee and more an acknowledgment of support. This will feel fantastic to individuals who are well aligned with your principles and who wish to advocate for and support all things gifted.

In addition to good vibes, your Affiliate might create a host of member incentives and benefits, such as:

- ❖ special newsletters or other communications
- ❖ a chance for door prizes at events
- ❖ use of a lending library or other resource
- ❖ discounted fees to programming
- ❖ reserved special or priority seating for coveted programming

Beyond your local arena, CAGT/Affiliate members receive updates from CAGT on programming and legislative issues, including suggestions for how to be involved at the state level.

Why Generate Memberships?

For two reasons (at least):

- 1) Strength comes in numbers. Not only can membership numbers help demonstrate the interests of your local gifted community, but they can also help CAGT demonstrate the size and shape of the community for which it speaks state-wide. Thorough documentation of your membership numbers can also help you assess your growth and impact from year-to-year.
- 2) CAGT’s financial support of Affiliates grows with membership size. Affiliate funding from CAGT is linked to memberships, at least in part. See specifics in the Appendix on CAGT’s Partnership Program.

Regardless, veteran Affiliates often report that new members, especially those who build capacity while they are general members, can help infuse and sustain an Affiliate’s cadre of volunteers and board. You should have a keen interest in spreading your enthusiasm and energizing others about your work!

How Should my Affiliate Track and Document Membership Information?

Since memberships are dual with CAGT, both CAGT and Affiliates have some responsibility over membership data and fees. CAGT maintains significant systems that track membership data, manage communications, and organize the annual CAGT conference. While it might be possible to obtain the training to use CAGT’s systems, many Affiliates find it easier and more efficient to download their subset of CAGT’s membership data and use alternate systems (e.g., Excel and Mailchimp, Google Suite, or other platforms specifically for nonprofits or other small organizations). Affiliates can then manage individual membership lists and communications regionally.

Whatever system you use to meet your local needs, some things remain constant: CAGT’s overarching systems maintain official membership lists. CAGT tracks all memberships generated through the CAGT website and oversees the financial reconciliation of membership dues each Spring. CAGT and the Affiliate each receive a portion of the membership fee. (See other sections on Financials and on the Affiliate Partnering Program for more

information.)

Affiliates can also accept membership registrations/renewals by accepting cash or checks in person. This commonly happens when enthusiastic attendees express interest at a local event. In this case, Affiliates must collect and share contact information with CAGT so that the member can appear on the official roster maintained by CAGT. Once on the official roster, members will receive CAGT newsletters, calendar items, and information in addition to the messages you send locally.

Affiliates must also then track the new membership to ensure that CAGT allocates the appropriate portion of the membership fees to the Affiliate. This typically happens in the Spring during CAGT's reconciliation process: CAGT will keep a running list of data from all memberships, including which funds went directly to CAGT and which were received by the Affiliate. CAGT will reconcile the transactions, without money necessarily travelling back and forth between CAGT and the Affiliates as memberships come in. In the Spring, CAGT will send a check, according to the guidelines for the Affiliate Partnership Program, for the fees owed the Affiliate. To ensure this process goes smoothly and accurately, the Affiliate should maintain documentation that allows such reconciliation to occur. CAGT will provide a complete list of memberships.

Assuming all member information gets logged appropriately, CAGT systems will provide updated membership rosters intermittently to Affiliates. The dissemination of rosters is currently done via an online portal (2019). Each Affiliate should have an individual assigned to manage this task, perhaps as a membership chair on the board. This person can gain portal access through CAGT and will be notified monthly when lists are ready for download. If CAGT modifies its systems, this individual will be an ideal contact for maintaining connections and learning new systems.

Tips and Models:

❖ Methods for recruiting members

- Designate a main point of contact to help ensure consistency in messaging and responses to inquiries. This person might be the chair of a membership committee or merely a board member tasked with membership duties.
 - Consider developing a single, identifiable email address (e.g. membership@myAffiliate.com) or web form to serve membership inquiries.
- Create resources (e.g., handouts, website, social media) to carry messages about your organization so that potential new members can continue learning about your goals and efforts beyond an initial contact with you.
 - Find ways to continue to engage individuals who find their way to your programs.
 - Note that using CAGT's membership lists may only capture a small subset of people interested in your work.
- Build a network of communication outlets where you can post information about your organization.
 - Build a list of--and use--social media sites, bulletin boards in locations consistent with interests in giftedness and education, free advertising resources, and local periodicals.
 - As you evolve, you might consider if and how you could incorporate press releases to local newspapers, school newsletters, PTO/A networks, etc.
- Support word of mouth referrals.
- Think about what you offer as membership benefits and how you will talk about them.
 - Might you offer a special newsletter? Could you do something special at your annual Membership meeting? Offer special services or door prizes to members who attend your events? Offer discounts to your Affiliate programming?

- Partner with your local school district(s), independent schools, and homeschool communities to find like-minded others. Look for partners in niches where individuals with an interest in gifted education reside. Keep in mind that due to confidentiality policies, most sources won't release the names and contact information for gifted students or their families, so it is up to you to provide informational messages about your organization and activities and provide a mechanism for capturing email addresses or other ways to continue to connect.

❖ **Methods for retaining members**

- Expand the role of the person(s) in charge of membership and communications to help manage membership and maintain communication. Keep organizational values and activities at the forefront of people's minds.
- Support word-of-mouth channels that share information about programming and other activities. Word-of-mouth connections build valuable networks.
- Create opportunities for veteran members to volunteer with your initiatives and to put their built capacity to work within the organization.

- **Resources for more information:**

SOURCE: <https://www.neoncrm.com/membership-engagement-mistakes/>

❖ **Build on relationships with friends**

- Develop methods for identifying and responding to people who have been members recently, but whose membership may have inadvertently lapsed. A *new* member, according to CAGT's record-keeping, is someone who has not been a member for the last three years, but memberships expire annually on August 31.
- Likewise, you may wish to develop a system to tracking and communicating with "friends" of your organization, perhaps people who have shown an affinity for your work or giftedness generally. You might communicate and nurture a relationship with these people with the hope that they might someday convert to members--or board members!

❖ **To "Dues" or not to "Dues" -- We have the answer!**

Members play a key role in informing programming, offering volunteer assistance, and encouraging your work--but they also support your organization financially via dues. The CAGT Affiliate Partnership Program, described later in this handbook, provides the mechanism by which dues are transformed into the core of your budget. Below are the steps to ensure accountability in the CAGT system:

- Direct existing and new members to join your Affiliate via the CAGT association membership software system, accessed through the [CAGT website](#) membership page.
 - For emerging Affiliates: Members can join your Affiliate **AFTER** your Affiliate has been approved by CAGT. Members will select your organization from a drop-down menu in the online form.
 - Existing members might wish to change their affiliation to you after your new Affiliate status is confirmed. Members can contact CAGT personally to request

such a change.

- During the annual review process, CAGT reconciles membership lists and issues Affiliate Partnership funds. If you have collected membership dues locally in cash or check form, you will need to pay CAGT its proportion of the dues. Likewise, CAGT will transfer to you your portion of dues it has collected through the online process. (See the [Affiliate Partnership Program](#) section in the Appendix for more information.)
- For any dues collected locally in cash or check for new or renewing members, please do the following:
 - As soon as possible, please transmit applicant information [name, address, phone number, school, district, email and role (parent, teacher, administrator, etc.)] via email to cogifted@gmail.com. CAGT will enter this information into its membership and communication systems.
 - Document the memberships for which your Affiliate has accepted dues directly and prepare to make sure the annual reconciliation process correctly notes those fees held by you. CAGT will provide a complete membership list with the various fee components assigned to you and to CAGT, following the rules of the Affiliate Partnership Program. Ultimately, CAGT will send Affiliates checks for the amounts owed to them.

Committees

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Some Affiliates do not get much more elaborate in structure than a core board and a handful of volunteers, but some do include a range of committees and committee chairs. You may wish to consider the following examples as either intermittent or standing committees, perhaps led by a designated board member:

- ❖ Programming: Proposes programming and makes arrangements for Affiliate-sponsored programs and speakers. Develops relationships with potential collaborators, venues, and vendors.
- ❖ Membership/Community Outreach: Develops strategies for recruitment and communication with members; keeps membership, dues, mailing, and emailing lists in order; for small Affiliates, sends letters of acknowledgment and welcome to new members; for larger Affiliates, develops materials and systems for engaging new and sustaining members.
- ❖ Publicity/Marketing: Writes press releases and contacts media regarding meetings and special projects.
- ❖ Fundraising: Recommends and implements fundraising projects.
- ❖ Communications: Maintains social media and website platforms and messaging, develops communication plan with associated messaging to disseminate throughout the year, creates and distributes newsletters.
- ❖ Special Projects: Works on projects, such as summer programs, Saturday programs, awards for scholastic excellence, purchasing of special equipment, applications for grants, in-service opportunities for school district professionals, parenting seminars, etc.
- ❖ Advocacy: Provides information to local members regarding gifted and talented-relevant legislative issues, works with CAGT on Legislative Day, assists stakeholders with local grassroots efforts.
- ❖ Budget: Formulates the budget for the year, works directly with the executive committee to determine allocations of funds, manages banking and reimbursements for expenditures.
- ❖ Hospitality: Creates a welcoming environment at Affiliate functions, often with refreshments.
- ❖ Community Liaison/Outreach Coordinator: Works with the members of your gifted community who do not speak English, facilitates translation or interpretation of written communications or programming, proposes other strategies for striving for equity in distribution of services.
- ❖ Recognition: Solicits feedback regarding positive practices in gifted and talented education and honors proponents of giftedness.

- ❖ At Large Members: Individuals who represent various community groups or stakeholders, whose input is sought during decision-making (e.g., lead administrator for district gifted education initiatives, independent school representative, homeschool parent representative, member of the counseling community).

Each Affiliate determines which, if any, standing committees it believes necessary to achieve its goals. Ad hoc committees can be added as needed per each Affiliate's bylaws.

Programming

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Many sustaining Affiliates consider programming and delivery of resources their first order of business--determining the issues most important to address and *how* best to address them, given their communities and resources.

Tips and Models:

❖ **Possible programming activities might include:**

- Creating a forum for parents to discuss social, emotional, and academic needs of their children
- Providing online resources about the needs of gifted and talented students and academic program options
- Developing a resource guide for teachers on ideas, strategies, and best practices to enhance the education of gifted and talented students
- Planning action steps to support and advocate for gifted and talented education
- Bringing district, state, and national experts to present on relevant topics
- Offering a representative voice by participating in district committees that serve gifted education
- Providing a panel of speakers with perspectives on the social and emotional needs of the gifted
- Sponsoring a series of events targeting parenting issues
- Organizing enrichment activities for gifted and talented students
- Sponsoring or co-sponsoring professional development activities for educators
- Partnering with local organizations that can serve the needs of gifted and talented students and families
- Organizing a showcase in which gifted and talented students can highlight their passions or recent projects

Successful Affiliates generally cast a wide net, working to provide support and advocacy for the greater good within the gifted and talented community, whether that be for children within a region, schools in a particular district or BOCES, or more broadly within all of Colorado. CAGT and Affiliates do not advocate on behalf of specific families or children.

❖ **Avoid programming pitfalls by:**

- Taking advantage of your audience for feedback.
 - Considering creating a feedback survey for programming events.
- Having “tickler” questions prepared to facilitate discussion during a forum or panel
 - You might not use them, but they may be essential to get the conversation started.
- Coordinating with all stakeholders to prevent misconceptions about a sponsored event
 - Communicate with your stakeholders, and keep your ears to the ground.
- Incorporating contingency planning for things like weather, emergency cancellations of speakers,

technical difficulties, etc.

- Think through challenging scenarios and potential responses. Things rarely go perfectly-- but that doesn't need to equal disaster. Build your capacity to adapt to shifting circumstances.
- Learning from previous program experiences to build better future events.
 - Document your reflections post-event so that you can refer to your assessments later.
- Having a good sense of the “pulse” of your community when planning activities.
 - Consider conducting a needs assessment of some type, even if small.

TIPS FOR SUSTAINING YOUR VOLUNTEER NETWORK

◆ *Enlist the help of your board members and volunteers to help overcome pitfalls.*

◆ *Delegate authority and spread responsibilities among your involved colleagues. Sharing leadership can help you gain momentum, spark excitement, and prevent burnout.*

◆ *Involve as many people as possible, even those who cannot attend meetings, to create networks of communication, influence, and problem-solving.*

◆ *Give each person more than one reason for attending each meeting.*

◆ *Identify the skills and interests of volunteers, and spread information widely to build capacity among them.*

Budget/Finances

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As an emerging Affiliate, your budget may be very small and dependent upon funding from the CAGT Affiliate Partnership Program. (See Resources below.) Support from the Partnership Program is based on membership dues and a base stipend so that every Affiliate receives at least some funds to support initiatives.

Many of our long-standing Affiliates also operate on small budgets, however, and Affiliates in regions with less dense populations may have fewer opportunities to build large membership rolls. Time and again these Affiliates prove that creative fundraising and low-cost programming can yield wonderful impacts.

More important: Big or small, your budget's size does not relieve you of fiscal responsibility--one of the most significant obligations of any board. Affiliate board members should have among their highest priorities the adoption of sustainable best practices for and oversight of financial operations.

❖ **Accounting Methodology.**

When you organize your Affiliate, establish a clear method of accounting. This requirement of good business practice will protect you from headaches later and will facilitate filing tax forms, especially if you decide to become a 501(c)3 organization.

❖ **Financial Management**

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If you don't have financial expertise within your organization, you may want to consider hiring a professional or seeking a volunteer with experience and time to properly manage your Affiliate's finances. If you become a nonprofit organization, budgets are required for annual reporting to the IRS and Secretary of State, as they are for all Affiliates to CAGT as well.

Your annual budget should include current and future year forecasts for revenue and expenses. While a budget can be flexible, it is important for the organization's leadership to approve an annual budget from which to guide operations. You don't want to spend what you don't have or don't anticipate having.

Your initial budget years may look as simple as the example budget proposal located in Appendix VII, where your initial income consists of monies from CAGT, fundraising, and grants, and your initial expenses consist of office, program, fundraising, and grant allocations.

❖ Resources for more information:

- Mythbusters
 - The article, [Nonprofit Budgets Have to Balance: False!](#) covers everything budget: surplus budgets, break-even budgets, deficit budgets, and the misconception that a nonprofit's budget has to balance at the end of the year.
 - [When is a deficit ok?](#) (Propel Nonprofits)
- Restricted funds
 - [Managing Restricted funds](#) (Propel Nonprofits)
- True Program Costs
 - [Own your own costs](#) (National Council of Nonprofits)
 - [True program costs: Program budget and allocation template](#) (Propel Nonprofit)
 - [Cost allocation primer video](#) (Propel Nonprofits)
 - [Program based budget builder](#) free template (Wallace Foundation)
- <https://www.councilofnonprofits.org/tools-resources/budgeting-nonprofits>
- A 5-Step Guide to Budget Development, for those who like PowerPoint presentations: https://www.youtube.com/watch?time_continue=3&v=edC7v81Fmj8

❖ Financial Sustainability

Fundraising beyond Membership is hard, additional work, but some Affiliates embrace it in order to facilitate their goals. Some Affiliates design fundraising events such as annual trivia nights; others have pursued grants and donations from the local business community.

A budget is important in all cases--for establishing the funds you have to invest to get your fundraising activities off the ground, for presenting your financial position for consideration to donors and grantmakers, and for displaying your financial trajectory into the future. Your budget provides a means for qualitative and quantitative storytelling that helps potential donors and others understand the impact of their contributions.

❖ Resources for more information:

- Find additional information about fundraising pitfalls at: <https://donorbox.org/nonprofit-blog/10-nonprofit-fundraising-mistakes-to-avoid/>

Insurance

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Insurance is a risk management tool that can be comforting, but costly. *CAGT does not offer Affiliate organizations insurance and cannot cover Affiliates under its own policies.* Some Affiliates decide that coverage for their organization is essential to protecting the people and assets that support the organization’s mission, vision, and purpose. Other Affiliates tell us that their budgets are too small to afford extensive coverage and that their activities seem minimally risk-intensive for the moment. Of course, each Affiliate board needs to evaluate the organization’s insurance needs at various stages of organizational development to make independent, informed decisions.

As you explore your needs and options, you will find various types of insurance that might apply to your situation. Affiliates are often familiar with liability concerns related to programming: What if someone trips and falls at an event? In fact, many Affiliates purposefully partner with organizations such as school districts to help mitigate such liabilities, as they can sometimes gain coverage through their partners’ insurance. On the other hand, some venues might request that you bring your own insurance with you when you have an event on their premises. Read contracts carefully.

You should become familiar with a range of insurance types (accident, volunteer, etc.) and their relationship to your organization and the type of activities your Affiliate conducts. Affiliates are increasingly asking about Directors and Officers (D&O) insurance, which offers coverage for, among other things, fiduciary oversight and governance decisions and provides an important buffer between organizational assets and personal assets.

As you consider insurance providers who are specialized in non-profit-type organizations, remember that shopping for your organization is similar to shopping for your family or other professional purposes: Policies are not created equal, so compare coverage, prices, and service prior to buying. Don’t forget the importance of claims handling and the expertise of the insurance carrier.

❖ Resources for more information

- <https://www.thebalancesmb.com/insurance-nonprofits-should-consider-2502320>
- <https://www.insurancejournal.com/blogs/charity-first/2016/08/05/422285.htm>
- <https://www.nonprofitrisk.org/resources/articles/what-do-you-know-about-do/>

Communications

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Communications can make or break a relationship, organization, or project. This important skill allows us to distribute information, to connect people and/or causes, and to manage organizations. Some Affiliates designate board members or volunteers to be in charge of specific communication tasks, like newsletters or press releases. Some Affiliates even work toward maintaining a communications plan or calendar for the yearly cycle of activities. In addition to information exchange, requesting action, and coordinating efforts, you should consider when and how you communicate “thank you” to individuals and entities that have provided support, directly or indirectly, to all your efforts and accomplishments.

Tips and Models:

- ❖ Communicate with your schools. Develop relationships inside the schools, and let your contacts know what you want to accomplish. As the schools get to know your group, you may be amazed at the cooperation extended to your new Affiliate.
 - Realize, however, that district conduits might omit homeschooling or pre-K families. You may need to find other ways to communicate with these populations.

- ❖ You may want to create an email account for your Affiliate. If your website provider doesn't give you an address option, there are several free email providers (ex. gmail, hotmail, yahoo) you might consider. Consider choosing a name that is easy to remember and includes your Affiliate name or acronym.
- ❖ Create a website--and **keep it updated!** You can see on the CAGT Affiliate webpage that many [Affiliates](#) also have websites. These vary quite a bit and can depend on the needs and resources of each group. In all cases, websites provide an additional way to share information and to connect people with organizations.
 - There are many website and blog options; some are free.
 - Affiliates can use CAGT's website as a reference.
 - Affiliates needn't have a website at all, can develop a very simple site, or can develop a website slowly, as the resources to build and sustain a website can be significant. Some Affiliates that are embedded within school districts can launch a page on the district's website.
 - Please share your website address with CAGT, so it can be listed on CAGT's website.
- ❖ Your Affiliate may want to send out informational emails or a newsletter. Using email can be an inexpensive way to provide timely information and regular contact with your members. If possible, please add CAGT to your list of email/newsletter recipients: cogifted@gmail.com.
 - Acquaint yourself with the Controlling the Assault of Non-Solicited Pornography and Marketing (CAN-SPAM) Act of 2003. While this federal law primarily regulates commercial ventures, it does not exempt nonprofits, so some rules might apply to your email marketing and other communications.
- ❖ For regular mail, some Affiliates have a P.O. Box, but other Affiliates use a board member's home address. Check on costs for a P.O. box and the comfort-level of board members with assigning their personal addresses to Affiliate purposes.
 - CAN-SPAM does require organizational address to be included on some communications, so such public posting might impact your decision-making on the type of mailing address you use.
- ❖ Some Affiliates choose to provide a phone number as an additional contact. Of course, this might mean that an Affiliate board member needs to provide a personal phone number and agree to be attentive to fielding phone inquiries.
 - Offering organizational email addresses and phone numbers is only effective if you are attentive to the associated inboxes and voicemails. Only establish systems that you are able to maintain. You might have to be a little creative, assign a specific person to systematically check and respond to messages, or share responsibilities. Use technology to help you manage.
- ❖ Develop an organizational logo that can provide a visual identifier of your organization and can help people begin to recognize you easily. Although it's recommended that each Affiliate have its own logo, if you are just starting out, you can use the CAGT logo as a placeholder. Please contact CAGT to access its graphic.
 - **You should only use the CAGT logo as a placeholder, while you are establishing your early presence; you are not allowed to alter the CAGT logo or adopt key elements of its design as your own.** Designing your organizational logo can be a fun and creative task--and should be an early priority that will reinforce your organizational identity and help build name recognition within your community.
- ❖ Communicate gratitude and public congratulations. Keep a positive outlook and display it when you recognize your volunteers, supporters, and partners. Use periodical/social media posts to express your gratitude and appreciation. Handwritten notes are even still in vogue in these situations!

❖ Resources for more information

- <https://www.pursuant.com/donor-experience/8-communication-mistakes-nonprofits-make-and-how-to-avoid-them> (general)
- <https://www.spire2.com/1-nonprofit-communication-mistake/> (decision-making)

- <https://www.pursuant.com/resources/> (fundraising)
- <https://www.johnhaydon.com/nonprofit-email-newsletter-mistakes> (e-newsletters)

Data and Information Management

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Take time to establish an effective framework for managing your Affiliate’s data and information and reviewing it intermittently to help advance your organization’s mission and attain your long term goals.

Good records are vital to facilitating good organizational practices. Developing systems to document relevant information--and keeping track of it--will help you execute annual business functions, document essential filings, and create a written history to pass along as your Affiliate evolves. Even as a small organization, you will potentially want to maintain records on things like bank accounts, tax filings, renewal requirements for your digital platforms (e.g., domain name, website host), nonprofit status and filing needs, post office box, trade name filings, and a host of login names and passwords. Even if your organization is an informal one and doesn’t have all of these items, don’t neglect the need to document, keep notes, and file info on the items you do have!

On the most basic level, meeting minutes and similar notes create a written history to assist during organizational transitions. Good records increase efficiency and accountability and prevent missteps as your Affiliate ages. New people can review events, issues, and concerns that have previously been addressed. Even veteran board members may need to refresh their memories from time to time.

Good records and documentation also provide valuable resources for analyzing your organization’s progress towards milestones and goals. Think about how you can document both logistical information (e.g., the capacity of various programming venues) as well as information that provides evidence of your successes, challenges, and improvements (e.g., how many people attend events so that you can compare year over year, or how many members you have each year at important points such as after a membership drive or at year’s end).

Think not only about the types of information you need to maintain, but also how you plan to maintain them. Will you maintain 3-ring binders of paper or ultimately rely on electronic files? If electronic, how will share information among your board, for example? Will you use Google because your school district uses that and will provide space, or will you opt for something separate and self-standing? Will you pass information to the next set of board members on USB drives or a cloud-based system? If you’re not careful, within a few years you might have some files on a past president’s hard drive, some in DropBox, some on a shared Google drive, and some elsewhere. It’s not the end of the world--but not very efficient!

- ❖ Additional information about data management can be found at the following links:
 - <https://www.google.com/nonprofits/#/>
 - <https://aws.amazon.com/free/?all-free-tier.sort-by=item.additionalFields.SortRank&all-free-tier.sort-order=asc>
 - <https://www.wildapricot.com/articles/199-free-or-cheap-online-nonprofit-tools>
 - <https://www.softwareadvice.com/nonprofit/>
- ❖ **Resources for more information**
 - <https://www.sidekickssolutionsllc.com/4-as-of-nonprofit-data-management>
 - <https://www.donorsearch.net/donor-management-mistakes-guest-post/>
 - <https://www.google.com/nonprofits/offerings/apps-for-nonprofits/#/>

Anyone can call a meeting, but to hold an effective meeting takes skill and practice! An effective meeting needs:

- ❖ A clear purpose, which can range from information-sharing to problem-solving to decision-making
- ❖ Good communication, including multiple modes, such as verbal and visual
- ❖ A well prepared agenda, with a nod to time allocations to keep the meeting on task and schedule
- ❖ Appropriate meeting members and other resources

❖ **Resources for more information**

- <https://jurassicparliament.com/meeting-mistakes/>
- <https://www.skillsyouneed.com/ips/meetings.html>

Tips and Models:

Suggestions for your *introductory general meeting*, after your executive board is organized and ready to throw open your doors:

- ❖ Some new Affiliates have used an initial meeting structure that includes a short “business” meeting and a program with a speaker or educational focus thereafter. Brainstorm your own approach. You don’t need to solve the world’s problems or have the party of the year: You need to bring people together and create a starting point.
- ❖ Consider contacting key school personnel, including administrators, about the proposed meeting.
 - Some districts will make school space available to you at no cost, especially if the arrangements are made through the district’s gifted and talented office. Other districts don’t have the space or have policies that limit “outside” groups, but may nonetheless have suggestions about meeting locales.
 - Learn about the communications policies for your district, as these may shape which meetings you are able to publicize and how.
 - Enlist district support and involvement. Ask district personnel if their policies allow them to help with publicity, for example, by emailing announcements to families of gifted children or teachers.
 - Use a range of methods to let people know about your meeting--school newsletters, websites, “Friday folders,” etc.--after getting permission from building principals and other appropriate personnel. You might consider publicizing your meeting in the community through libraries, newspapers, etc. Again, each venue might have relevant policies you’ll need to follow.
 - **Don’t forget to let CAGT know about your events, so they can be included in the monthly *Happenings* and on the CAGT calendar!**
- ❖ During the introductory community meeting, get a sign-up list of parents and others interested in becoming involved with the Affiliate. Make sure people who would like to opt in have a way to do so!
 - Consider bringing an iPad or laptop to meetings or events so that people who want to become members can sign-up right away--with your help.
 - Ask those parents to enlist others who may be interested in the group. Consider providing business cards or flyers, as your budget allows, with your contact information to share.
 - Survey parents, educators, and other community members about their special needs and suggestions for activities and the areas of expertise they might contribute to your effort.
 - Keep a roster of members’ names and emails handy in case people would like to confirm their

membership or if you would like to follow up with them specifically.

- Offer translation or interpretation, especially if you know that service will likely meet needs in your community.

Suggestions and models for *various types of meetings*, including board meetings, membership meetings, and programming events:

- ❖ After your organization has introduced itself to your community and grows, you may want to schedule board meetings that are separate from general meetings. In essence, you may have board meetings to organize and coordinate working board members who lead your organization. You might then offer meetings to gather your full membership or to offer them and/or the general public programming.
 - Some Affiliates schedule meetings several times a year as a short (~20-minute) business meeting followed by a guest speaker.
 - If your board has separate meetings, consider how general membership will be able to view the activities and actions of the board, including goals being accomplished and set. Some Affiliates disseminate organizational information through newsletters or emails to members.
 - In some Affiliates, the executive committee/board of directors acts on recommendations from standing committees that also meet several times per year. In this case, the real work is done by the board and committee members, who meet as necessary.
- ❖ Some Affiliates hold an annual Membership Meeting that allows all general members to be involved in an open meeting of the board. Such meetings can provide a forum for recapping annual accomplishments, announcing new officers, and/or seeking feedback for the new or next year.
 - CAGT requires that Affiliates involved in the Partnership Program have at least one meeting open to full membership per year.
- ❖ Some Affiliates have several meetings a year which do not include a business meeting, but rather contain programming or other activities for the broader community.
 - Other Affiliates consider the purpose of the board to offer programming for their community, therefore, think of this activity as less meeting- and more event-based.

Regardless of how you choose to organize your meetings, it is important that they be conducted in a manner that is both efficient and orderly. Some groups use Robert's Rules of Order, which can be obtained in books or online, but many groups are more informal. In any case, it is advisable that issues are voted upon by voting-eligible members and that minutes are taken. Minutes should be presented and approved at the next meeting to document your organization's activity. Such minutes will ultimately become a part of the paperwork you submit to CAGT annually as part of the Partnership Program.

Partnership(s) --Building Networks with Education Leaders

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Positive collaborations across parents, teachers, administrators, and community leaders can foster awareness of the educational and emotional needs of gifted children and gain resources to meet those needs. Partnering with organizations throughout your community may help you avoid duplicating efforts, take advantage of previous projects with similar missions, and draw on the strengths and resources of like-minded individuals and other organizations. Look for opportunities to collaborate!

❖ **Resources for more information**

- <https://www.guidestar.org/Articles.aspx?path=/rxa/news/articles/2014/top-strategic-mistakes-nonprofits-make-part-3.aspx>

Tips and Models:

- ❖ Involvement of school and community members from the beginning. Many community groups and local businesses have an interest in gifted and talented education.
- ❖ First learn and listen. Educate yourself about what the schools are doing—and what they can do—through the use of district, state and federal funds, and laws/regulations/policies. This knowledge and a positive relationship with your school district will allow your Affiliate to encourage use of funds and changes in policy in ways that are meaningful, relevant, and realistic.
- ❖ Make an appointment with education leaders in your area to let them know the purpose of your Affiliate and how you want to work in collaboration with them. Educational administrators speak to many special interest groups, but they are particularly impressed by a group that is well organized and willing to work for the benefit of children. Show professionalism and purpose, and remember: *When you represent your Affiliate, you should be speaking for ALL gifted children and families and not just a single child or classroom.*
- ❖ Bring your positivity. Work for the best situations possible. No program will be perfect, but positive collaborations can bring decisive results for gifted and talented students.
- ❖ Offer your services in extending resources. Veteran Affiliate leaders suggest that newcomers keep in mind that administrators have other areas of responsibility and myriad concerns regarding policy, budgets, and organizations. Administrators also have limitations in those areas; this is where Affiliates can be powerful collaborative partners with schools, representing a proactive voice from the community in support of gifted and talented students.
- ❖ Harness the power of your membership in combination with others. A group has a stronger voice than an individual in asking for what it wants and in explaining why change is needed, whether the appeal extends to a legislator, a board of education, an educator, or the community. Alert educators realize that parents, as voters, can become a supportive part of the political process, not limited by the constraints affecting professionals in education.
- ❖ Contact teachers and administrators for introductions to potentially interested parents.
- ❖ Make announcements and permission to distribute materials at various school/district functions.
- ❖ Be sure to invite and involve your local schools, principals, teachers and PTA.
- ❖ Inform your local legislators, and invite them to your events. When CAGT representatives go to Washington, legislators reinforce their desire to know about and potentially attend our activities.

Affiliate Capacity-Building/Commitment/Sustainability of Organization [RETURN TO TABLE OF CONTENTS](#)

“Capacity building is whatever is needed to bring an [organization] to the next level of operational, programmatic, financial, or organizational maturity, so it may more effectively and efficiently advance its mission into the future. Capacity building is not a one-time effort to improve short-term effectiveness, but a continuous improvement strategy toward the creation of a sustainable and effective organization.”

SOURCE: <https://www.councilofnonprofits.org/tools-resources/what-capacity-building>

Not everyone, not even your most interested and engaged volunteers, will come with all the skills and capacities needed to support your multifaceted, emerging organization. Drawing on past experience may only be a starting point. Your colleagues--and you--are likely to benefit from acquiring new skills, developing abilities, and learning anew. This investment will lead these individuals and, through them, your organization to greater capacity and, in turn, a greater chance of sustainability.

Find ways to encourage your board members and other volunteers to invest in themselves in ways that further your organization. Recognize good work. Share information. Piggyback on passions and innate skills. And, build

a cadre of informed others to share the workload today and to sustain your organization into the future.

Tips and Models:

Take your organization to the next level:

- ❖ Talk about the needs of gifted children, not just YOUR OWN child or classroom.
- ❖ Advocate positively. Present needs in an organized and professional manner.
- ❖ Establish legislative and advocacy committees.
- ❖ Press releases and informational news stories submitted to your local newspaper increase public awareness. Include pictures. Select one of your members as a public relations person.
- ❖ Remember that parents and educators working together represent the best chance of securing appropriate educational opportunities for gifted children.
- ❖ Once your Affiliate is established and comfortable, request time at a school board meeting to introduce your group and its goals. Include school board members on your mailing list. Maintain a positive working relationship with the board. Present information on gifted education.
- ❖ Once your Affiliate is established, schedule an appointment with district administrators, especially the gifted and talented coordinator or person in charge of the gifted program, to familiarize them with your Affiliate and its goals.
- ❖ Present free membership in your Affiliate to legislators, board members, and administrators. This can be done, if you maintain local membership list and emailing systems, by adding emails to your “friends list” and/or communicating your desire to include someone on the CAGT membership list. Some CAGT systems might have this capacity, while others do not.
- ❖ Take advantage of CAGT’s annual conference and the events sponsored by other Affiliates.
- ❖ Make as many connections as you can, in an effort to gather information from others who have already formed their Affiliates. (Other Affiliates are listed on the CAGT website.) We encourage you to contact other Affiliates and ask to be put on their email list if possible. Study their communications to pick up ideas. Ask questions of the CAGT Board’s Affiliate Coordinators.”

Become a resource:

- ❖ Volunteer in the schools in various ways.
- ❖ Investigate and visit other gifted programs or Affiliates, and share ideas that work.
- ❖ Identify and compile a list of places, people or things for field trips, programs or other opportunities in your area.
- ❖ Become a clearinghouse of information about conventions, workshops, and other activities.
- ❖ Create a website and/or Facebook page for your Affiliate.
- ❖ Email members with information about opportunities for people interested in gifted and talented issues.
- ❖ Provide information on summer enrichment programs in your area.
- ❖ Publish a newsletter with local viewpoints, resources, and book reviews.
- ❖ Compile a list of books, periodicals, and journals relating to gifted education. House a small library, so members can check out the resources.

Create new opportunities:

- ❖ Invite experts in the field of gifted education to speak at meetings.
- ❖ Sponsor conferences and conventions.
- ❖ Sponsor a “gifted fair” for students to show off talents and projects.
- ❖ Publish a book of stories and poems written by gifted children.

- ❖ Create a handbook for parents.
- ❖ Support a young authors' contest or creative problem-solving competition.
- ❖ Organize after-school and Saturday mini-courses.
- ❖ Raise money for scholarships for gifted children.
- ❖ Co-sponsor a speaker for district professional development for teachers.
- ❖ Host a workshop for high school students and parents with opportunities specifically for gifted students. Include issues of multipotentiality and twice-exceptionality, for example.

Develop leadership positions:

- ❖ Offer professional development opportunities.
- ❖ Create internal mentor programs (for example, past presidents might mentor current and presidents-elect).
- ❖ Conduct self-evaluations of board members, and develop goals to address weaknesses and build on strengths.
- ❖ Support board members in applying newfound skills, talents, and interests.

❖ Resources for more information

- <https://www.missionbox.com/article/51/capacity-building-what-it-is-and-why-it-matters>
- <https://morancompany.com/best-practices-nonprofit-leadership-transition-new-year/>
- <https://murdocktrust.org/prepare-executive-transition/>
- <https://www.501commons.org/learn/career-resources/leadership-transition-and-succession>
- <https://www.mckinsey.com/business-functions/organization/our-insights/successfully-transitioning-to-new-leadership-roles>
- <https://www.forbes.com/sites/forbescoachescouncil/2017/02/27/lessons-on-leadership-transitions-the-good-the-bad-and-the-ugly/#3504fb2d1f9f>

Inactivity / Termination

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At some point, your Affiliate may become inactive, perhaps to step back to re-evaluate your organization, perhaps due to a leadership gap, or perhaps because of a lack of resources. Whatever the reason, if inactivity is prolonged, the Affiliate may dissolve, requiring a number of actions, including sending all remaining organizational funding (after paying debts) to CAGT.

As you establish your Affiliate, you should develop a comprehensive and transparent termination plan to ensure all legally binding activity is accomplished in such a case, especially if you're a 501(c)3 organization. This plan should be logged in your bylaws prior to submission to CAGT for approval.

Below is a link that may help you through essential activities during an organization's dissolution:

- ❖ <https://www.councilofnonprofits.org/tools-resources/dissolving-nonprofit-corporation>

Additional Considerations for Establishing Your Affiliate

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- ❖ **You are Your Own Organization!** If you're a new Affiliate, congratulate yourself on establishing your own, self-standing body. If you're a part of a longer-standing Affiliate, congratulate yourself on sustaining an organization that is gaining history. Regardless, recognize that you are your own legal

entity, associated with CAGT, but also very much an independent organization. While that comes with significant responsibility, it also comes with significant accomplishment. Good luck in pursuing your goals and making your mark!

- ❖ **Name and Trade Name.** As your Affiliate considers establishing a name for your organization, check to see if another organization in Colorado has already registered your preferred names. You may want to also register your trade name (a name, other than your official name, developed for doing business) with the Colorado Secretary of State. This might be advisable if you are intending to use a short form of your official name.
(<https://www.sos.state.co.us/pubs/business/FAQs/tradeNames.html>).
- ❖ **Employee Identification Number (EIN).** Your Affiliate must apply for an EIN by filing form SS-4 with the IRS. Your Affiliate will need to do this in order to establish a bank account.
(<https://www.irs.gov/forms-pubs/about-form-ss-4-application-for-employer-identification-number-ein>; <https://www.irs.gov/businesses/small-businesses-self-employed/apply-for-an-employer-identification-number-ein-online>).
- ❖ **501(c)(3).** A 501(c)(3) organization is recognized as a tax-exempt, non-profit organization as defined by the IRS. Your Affiliate will want to examine its needs, goals and activities to determine if a 501(c)(3) status is something you want or need to pursue. 501(c)(3) status is required for many grants or outside organization-sponsored fundraising activities. (<https://www.irs.gov/charities-non-profits/charitable-organizations/exemption-requirements-section-501c3-organizations>)

YOU ARE AN AFFILIATE -- WHAT NOW?

Congratulations on becoming a CAGT Affiliate and welcome to the CAGT team!

Through this process, your organization has established an entity to help your community understand and advocate for our gifted students. In addition to everything you've learned to date, you should realize you also have a substantial tool kit and statewide resources to draw upon and the ability to impact local, state and federal views and laws about giftedness.

That said, we challenge you to:

- ❖ Continue to educate yourselves and your community about giftedness
- ❖ Continue to seek out and strengthen community relationships
- ❖ Be an active part of the CAGT organization and annual events
- ❖ Inform CAGT of challenges in your region that we can collectively address
- ❖ On the flipside, inform CAGT of successes in your region that we can collectively share and leverage for the good of all
- ❖ Collaborate with other Colorado Affiliates for programming opportunities
- ❖ Encourage NAGC/CAGT-aligned advocacy with local, state, and federal leadership

Also, don't forget to focus on the wellness of your organization and don't hesitate to reach out for help. We have access to people with a variety of skill sets, a large range of information, and a multitude of contacts to help you succeed.

Last, thank you for your efforts to date and to reiterate our Executive Director, "We at CAGT want to embrace what Affiliates do and need ... We are excited to help you on this journey!"

RESOURCES THAT MIGHT BE USEFUL

The following topics provide further explanation of the CAGT resources available to Affiliates.

Affiliate Grant Program

CAGT created the Affiliate Grant Program, new in 2019, to help bridge the gap for Affiliates who would like to host events for students, parents/families, and/or educators, but might not be able to due to lack of funds. CAGT strives to alleviate some of the financial roadblocks that Affiliates encounter by providing another funding resource for Affiliated. Please see Appendix VIII for more information, to view sample application materials, and to link to updated forms.

Affiliate Mentor Program

The CAGT Affiliate Mentor program assigns new or developing Affiliates with a veteran CAGT member/Affiliate leader to help in the early stages of start-up and beyond. A CAGT mentor can be a valuable resource as you navigate the formation of your significant community group, providing a sounding board and being a guide as you move through your first year or two. If you have not been assigned a mentor, please contact the CAGT Executive Director.

The annual CAGT conference is often a fantastic time to learn more about CAGT as an organization and a convenient time to meet with your Affiliate mentor and members of other Affiliates. Typically, the conference features a session especially for Affiliates and their concerns. Check the conference program.

Affiliate Partnering Program

CAGT understands and appreciates the unique and invaluable relationship that Affiliates bring to our state organization. Because of the support of all giftedness advocates (parents, educators, administrators and community members) across the state, we have been able to serve and advocate for gifted children in a very positive way!

Only active Affiliates may participate in this program. Active Affiliate membership must include the following activities, in addition to following the bylaws of the Affiliate and the state organization:

- ❖ Holding Affiliate board meetings
- ❖ Communicating with members
- ❖ Programming for the benefit of gifted students or advocates, which is open to everyone regardless of CAGT membership status
- ❖ Using Affiliate funds for activities only while the Affiliate is in good and active standing with CAGT

In addition to meeting the above criteria of an active Affiliate, Affiliates must annually compile the following items and submit to the CAGT Executive Director in response to a late Spring/early Summer mailing:

- ❖ Statement of understanding of the above requirements (signed by Affiliate Board members)
- ❖ Agenda or minutes from a board meeting (including Treasurer's report)
- ❖ Statement of communication plan for members
- ❖ An example/flyer from a recent programming event

Funding Distribution for Qualifying Pre-Existing Affiliates:

- ❖ All established Affiliates meeting the above criteria will receive annually \$350 plus \$5 for each CAGT membership renewal that has designated their Affiliate during the renewal process online. This was designed to be more equitable to both large and small affiliates.
- ❖ Affiliates that bring in NEW CAGT members will receive \$30 per member for the initial membership year. New members are defined as those not having been paid CAGT members during the past three (3) years.

Funding Distribution for NEW Affiliates:

- ❖ New Affiliates receive a total of \$500 for the initial year. \$100 out of the \$500 will be issued as initial startup money with the remaining \$400 to be issued upon approval of their Affiliate status by CAGT.
- ❖ Once the first year passes, the Affiliate receives a prorated amount of the Affiliate Partnering Program (\$350) until the next full membership year.
- ❖ New Affiliates are also eligible for the NEW membership portion of this program (\$30 per member)
- ❖ New Affiliates may forego this section and go directly to the Affiliate Partnering Program if it yields a higher benefit for them.

REMEMBER... If at any time, an Affiliate becomes inactive or is no longer in good standing, the Affiliate bank accounts must be turned over to CAGT. These funds will be held for safekeeping and released back to the Affiliate to restart in the future if the possibility arises.

Cvent -- And Other Association Membership Tools

Cvent is a tool which CAGT has used for multiple purposes, including, but not limited to, tracking CAGT and Affiliate memberships, facilitating communications, managing data, and coordinating conference and other event registration. CAGT anticipates that it will be changing association management systems in the first half of 2020. More information will be forthcoming.

CAGT Website

For additional reading, the CAGT website (www.coloradogifted.org) offers a variety of documents about Affiliate organizations. They are worth reading for ideas, encouragement, and cautions. Remember that each organization has its own circumstances regarding history, demographics, resources, challenges, and strengths, and each will accordingly develop its own personality.

Also, the CAGT website offers a plethora of resources. Please poke around for familiarity and self-education.

Speakers Bureau

A new CAGT Speakers Bureau has been developed to help meet the professional learning needs of our rural Affiliates. Local and statewide gifted and 2e experts, covering a wide range of topics for both parents and educators, will be available to present in your region for your Affiliate stakeholders. In order to schedule a speaker for your area, please email cogifted@gmail.com and ask for the Speakers Bureau Request Sheet to be shared with you. A list of topics may be reviewed upon request.

Contact Information

Email (general inbox for CAGT): cogifted@gmail.com
Phone number: 303-520-4887
Mailing Address: 18695 Pony Express Drive #2706
Parker, CO 80134
You must include the #2706, as it is a P.O. box.

We look forward to working with you for the gifted community!



CAGT would like to give special thanks to the following individuals for all of the hard work and tireless hours to create this new edition of the Affiliate Handbook:

Kristin Kusmierek, Lisa Webster, Valerie Davis, and Nanette Jones

APPENDICES

NOTE: All forms provided in this appendices are sample forms. For the most current form, please check the CAGT website or email/call CAGT.

APPENDIX I: Checklist for New Affiliate Establishment

Activity	Person Responsible/Lead	Planned Date	Actual Date	Additional Comments
Survey Community for Interest				
Call an Initial Interest/Steering Committee Meeting				
Develop Roles and Responsibilities for Steering Committee/Members				
Develop a Schedule of Milestones				
Develop Purpose, Vision, Mission				
Develop Goals and Objectives				
Develop Organizational Structure				
Develop Leadership Structure, Roles and Responsibilities				
Develop Budget				
Develop Fundraising Plan				
Develop Data Management Plan				
Develop Succession Plan				
Develop Communication Plan for membership, fundraising, and recruitment				
Develop Bylaws				
Develop Strategy for Networking with Community/District Leadership/Key Members				
Affiliate Submission to CAGT				
Determine if Affiliate will apply for 501(c)(3) and/or when this action				

might be in your best interest				
Apply for applicable Secretary of State status(es)/categories				
Develop Annual Programming Schedule				
Develop Executive Board and General Membership Meeting Schedule				
Develop Schedule to comply with Bylaw Requirements				
Develop Schedule to comply with Secretary of State and IRS annual requirements (as applicable)				
Set an Annual Reflection meeting to confirm, change, and/or set new goals and objectives, and develop plan(s) for next year				

APPENDIX II: Checklist for Annual Affiliate Requirements

Activity	Point of Contact	Submitted To:	Due Date	Additional Comments
Annual Statement of Understanding		CAGT	Late Spring - Early Summer	
Board of Directors Meeting Agenda and/or Minutes		CAGT	Late Spring - Early Summer	
Treasurer Report		CAGT	Late Spring - Early Summer	
IRS 990-type Form (as applicable)		IRS	NLT 4 months and 15 days after fiscal year closure	
Annual Charitable Organization Registration (as applicable; required for grant applications and variety of fundraising efforts)		Colorado Sec of State	Dependent on individual Affiliate timeline, based on initial application date	
Annual Periodic Report		Colorado Sec of State	Dependent on individual Affiliate timeline, based on initial application date	

APPENDIX III: Checklist to Establish 501(c)(3) Status (offered by the South Metro Affiliate, SoMe CAGT)

CAGT's South Metro Affiliate, SoMe CAGT serves Englewood, Littleton, and Sheridan--and established itself as a CAGT Affiliate and nonprofit early in 2018. Its founding board members offer the following outline of their process to obtain 501(c)(3) status, based on their learning and newfound understanding.

Obtaining 501(c)(3) Status (Fees subject to change):

Before Filing for a 501(c)(3)

- You must be registered with the Colorado Secretary of State as a Nonprofit Corporation and have an EIN Number from the IRS.
 - Register with the Colorado Secretary of State as a Nonprofit Corporation – Cost \$50
 - [Checklist for New Businesses:](https://www.sos.state.co.us/pubs/business/businessChecklist.html)
<https://www.sos.state.co.us/pubs/business/businessChecklist.html>
 - [Checklist for Nonprofit Corporation Filing:](https://www.sos.state.co.us/pubs/business/helpFiles/ARTINC_NPC_HELP.html)
https://www.sos.state.co.us/pubs/business/helpFiles/ARTINC_NPC_HELP.html
 - EIN Number – Cost FREE
 - Must register for EIN during hours of operation (Monday-Friday 7am-10pm EST)
 - [EIN Website:](https://www.irs.gov/businesses/small-businesses-self-employed/apply-for-an-employer-identification-number-ein-online) <https://www.irs.gov/businesses/small-businesses-self-employed/apply-for-an-employer-identification-number-ein-online>

To Become a 501(c)(3), File Form 1023.

- Link to information about the 1023 Form – to obtain 501(c)(3) Status: <https://www.irs.gov/forms-pubs/about-form-1023>
- File Form 1023-EZ - \$275
 - To file for the EZ form you have to complete this checklist first – This determines your eligibility. for pages 13-23 <https://www.irs.gov/pub/irs-pdf/i1023ez.pdf>
 - Link to file 1023-EZ: <https://www.pay.gov/public/form/start/62759871#>
 - [Template of 1023-EZ Form](#) to File
 - If you are registered as a 501(c)(3), you may be required to file a 990-N annually.
 - <https://www.irs.gov/pub/irs-pdf/p5248.pdf>

In Colorado, Register as a Charitable Organization.

- Link to instructions for registering in Colorado (\$10):
<https://www.sos.state.co.us/pubs/charities/instructions/charity/registration.html>

APPENDIX IV: Annual Statement of Understanding



**Colorado Association for Gifted and Talented
Affiliate Partnering Program Form**

To receive monies under this program affiliates must submit the following from the 2019-2020 school year:

- an agenda and/or minutes from a board meeting
- a treasurer’s report or bank statement showing transactions
- statement of how you communicate with members (i.e., emails, Yahoo, etc) and
- an example or flyer of a programming event your affiliate has hosted, co-hosted, or sponsored (should have affiliate’s name and/or logo on it)

Also, all board member officers must sign and date below showing that they are aware of these policies.

Affiliate Partnering Program:

Only active affiliates may participate in this program. Active affiliate membership must include the following activities, in addition to following the bylaws of the affiliate and state organization: 1) holding affiliate board meetings, 2) communicating with members, 3) offering programs for the benefit of gifted students or advocates, and 4) using affiliate funds (no matter how they are received) for activities only while the affiliate is in good and active standing with CAGT.

Board members of the affiliate must sign a yearly statement of understanding of these requirements. If an affiliate becomes inactive or is no longer in good standing, the affiliate bank accounts must be turned over to CAGT for safekeeping.

Please keep in mind that even though the Affiliate Partnering Program is based on paid CAGT membership, it has always been the policy of CAGT and its affiliates that programs are open to everyone no matter of their membership status. CAGT also encourages the affiliates to maintain a “friends” list for those that are not members, but still wish to be informed of upcoming events and legislation.

CAGT encourages all board members to become members of CAGT, but officers **MUST** be active members.

Name of Affiliate _____

Affiliate Board Member signatures (*if you need more spaces for signatures please begin a new page):

_____	_____	_____	Current Member Y / N
Print Name	Signature and Date	Position	
_____	_____	_____	Current Member Y / N
Print Name	Signature and Date	Position	
_____	_____	_____	Current Member Y / N
Print Name	Signature and Date	Position	
_____	_____	_____	Current Member Y / N
Print Name	Signature and Date	Position	
_____	_____	_____	Current Member Y / N
Print Name	Signature and Date	Position	

APPENDIX V: Sample Member Roster for Initial Affiliate Application

Member Name	Member Join Date	Member Date of Expiration (Dependent on Affiliate Fiscal Year, CAGT Fiscal Year or Calendar Year as determined by Bylaws)	Additional Information
John Smith	Jan 1 20XX	Aug 31 20XX	Moved into area after Christmas
Jane Smith	Sep 1 20XX	Aug 31 20XX	

APPENDIX VI: Sample Affiliate Meeting Agenda for Affiliate Partnership Program Annual Submission

XXXXX Affiliate, Executive or General Board Agenda

- GT Presentation to Board of Education (Scheduled for XX/XX/XXXX)
 - What do we want to include
 - Affiliate happenings
 - CAGT tie in
 - What's happening in the District
 - Challenges, Possible Solutions
- 20XX-20YY Events Feedback and Follow-On Planning for Subsequent Year
 - Event 1
 - Event 2
 - Event 3
 - Event 4
 - Legislative Day
 - Collaborative Optimist Club Event
- Additional Events?
 - Add Happy hour/Social hour/Coffee Talk?
 - Free Online Conference Sharing
 - CAGT working on a resource center to try to coordinate speaker efforts across Colorado
- Budget
 - ~\$XXXX in the bank before CAGT legislative day reimbursements
- Fundraisers
 - CAGT Annual Stipend
 - Fundraiser 1
 - Fundraiser 2
 - Grant 1
 - Grant 2
- Upcoming Bylaw Requirements
- Membership Review
- Succession Planning

APPENDIX VII: Sample Treasurer Report for Affiliate Partnership Program Annual Submission

This report can be provided via paragraph format or in tabular format (See Below).

“The XXXXX Affiliate currently has \$XXXX in the bank. We anticipate receiving \$YYYY funding from the CAGT Partnership Program and our fundraising efforts to support XYZ programming in the upcoming year (approximately \$ZZZZ in expenditures).” OR

	Proposed Budget for 20XX		Anticipated Budget for 20YY		Actual Budget for 20XX
Return from CAGT	500	**	750	****	500
Fundraising	1000		1000		500
Grants	500		1000		500
Total Income	2000		2750		1500
Office Expenses	200		200		200
Program Expenses	1500		2000		1000
Fundraising Expense	100		100		100
Grant Expense	100		100		100
Total Expenses	1900		2400		1400
Net Income	100		350		100

** seed money from CAGT

**** 20 new members at additional 25 each



Colorado Association for Gifted and Talented Affiliate Grant Program Announcement

CAGT is pleased to announce our new Affiliate Grant Program! We are excited to begin this endeavor to help support our new and smaller affiliates around our state.

The CAGT Board has been actively working to increase inclusion and participation from affiliates throughout Colorado. With that being said, the Board recognizes that affiliates in certain regions of the state may find hosting certain types of events for their stakeholders cost prohibitive. This could be due to geographic locations which would increase travel costs for speakers; having smaller CAGT membership; access to limited resources, and other challenges.

This new program was created to help bridge the gap for those affiliates who would like to host events (for students, parents/families, and/or educators) which they would not otherwise be able to host due to lack of funds. It is our goal to help alleviate some of these financial roadblocks so that affiliates may secure funding from this program for their events.

When your affiliate is considering hosting an event for your GT community but are unsure that you can afford the costs, we hope you consider applying for one of our CAGT Affiliate grants.

We will begin accepting applications on June 1st, 2019.

Thank you!

CAGT Community Outreach Committee

<https://docs.google.com/document/d/1dB47S5PQsd57uoF195s5hO7HQI7P8AYVJBTU8nObLJE/edit>

(Use this link for most current form)

APPENDIX VIII: Affiliate Grant Program Information and Sample Submission Form (cont.)

Grant Proposal Agreement

Thank you for submitting a proposal for your Affiliate event. We are excited that you are providing this opportunity for your stakeholders. CAGT is happy to be able to support you in your efforts to connect with the GT community in your corner of Colorado.

Please fill out the information below, sign and date, then submit all forms along with a copy of your Affiliate Board minutes that approved this event to CAGT at cogifted@gmail.com.

Affiliate: _____
Contact Person: _____
Email: _____
Phone: _____

Available Funding: The CAGT Board will determine funding for this affiliate program in accordance with the CAGT Bylaws. The affiliate must be in compliance with the Partnership Agreement in accordance with CAGT Bylaws to be considered for a grant.

- Grant amounts – Amount is not to exceed \$2000.
- Affiliate must agree to partially fund or pay the difference between the grant amount and the total cost of the event (e.g. through donations, event fee, sponsorship), if the event cost is greater than funding amount.
- When the available funding from Affiliate Grant Program is committed, CAGT will notify affiliates that applications will no longer be accepted for the remainder of the funding period.^[1]_[SEP]
 - Affiliates must reapply during the next grant program cycle.

*Applications must be submitted at least 12 weeks prior to the event for processing/approval turnaround and Affiliate needs. Then if the grant is not funded or partially funded, the Affiliate has time to proceed accordingly.

Application recipient has one calendar year to use the money granted and submit the final paperwork (receipts, flyers [advertisement], attendance, overall success of the event). If not used or the event is cancelled, the money needs to be returned to CAGT.

Approved status:

- Yes Amount granted _____
- Denied
- Partial Amount granted _____

Affiliate President
(of requesting Affiliate)

Nanette Jones
CAGT Executive Director

Diana Caldeira
CAGT President

Becca Koster
Designated Affiliate Representative

APPENDIX VIII: Affiliate Grant Program Information and Sample Submission Form (cont.)

Please complete all information including the Affiliate’s contact information, the grant proposal description and

the grant agreement.

Contact information:

Name of Contact Person	
Affiliate	
Email	
Phone	
Address	
EIN #	

Grant Description:

Intended Audience

- Parents
- Teachers
- Students
- Other _____

*Please indicate the approximate number of audience participants expected to attend _____

Type of Event

- Speaker
- Professional Development
- Student Activity (e.g. STEM, Summer Enrichment)
- Other _____

Purpose of the Event (why are you hosted this event): _____

Date and Time of Event _____

Description of Event:

APPENDIX VIII: Affiliate Grant Program Information and Sample Submission Form (cont.)

Estimated Budget: (*Exclusions – alcohol, personal compensation, other than speakers)

Intended Use of Funds	Estimate Costs:
<input type="checkbox"/> Speaker	_____ (Speaker's Fee)
	_____ (Travel costs)
<input type="checkbox"/> Facility Use	_____
<input type="checkbox"/> Equipment Rental	_____
<input type="checkbox"/> Materials (e.g. flyers, supplies, etc.)	_____
<input type="checkbox"/> Food	_____
<input type="checkbox"/> Other (Ex. _____)	_____
Total Amount requested _____	

*Any/all awards are at the sole discretion of the CAGT Executive Board and/or the CAGT Grant Application Review Committee. Depending on the merits of applications received (as deemed by the CAGT Executive Board and/or the CAGT Grant Application Review Committee), the number of applications, and the amounts requested, it is possible that not all requests will be funded. Any award received is one-time only, and subsequent requests will require a new application, pending continuation of this program. Acceptance of incomplete applications or applications received outside of the application period will be on a case-by-case basis and at the sole discretion of the CAGT Executive Board and/or the CAGT Grant Application Review Committee.

APPENDIX VIII: Affiliate Grant Program Information and Sample Submission Form (cont.)

Post Event Paperwork Submission

Name of Contact Person	
Affiliate	
Email	
Phone	
Address	
EIN #	

Actual Costs Budget:

Actual Use of Funds

Actual Costs:

- | | |
|--|-----------------------|
| <input type="checkbox"/> Speaker | _____ (Speaker's Fee) |
| | _____ (Travel costs) |
| <input type="checkbox"/> Facility Use | _____ |
| <input type="checkbox"/> Equipment Rental | _____ |
| <input type="checkbox"/> Materials (e.g. flyers, supplies, etc.) | _____ |
| <input type="checkbox"/> Food | _____ |
| <input type="checkbox"/> Other costs | _____ |
| Total Amount | _____ |

Please share feedback from your event (highlights of the event, key takeaways, specific attendee comments/suggestions, lessons learned or changes you would try for your next event).

Please attach all event receipts, a flyer (e.g. physical, electronic, newsletter), feedback survey results if you have one, attendance numbers. ****If not used or event is cancelled the money needs to be returned to CAGT.**

Submit this paperwork to cogifted@gmail.com or mail to CAGT 18695 Pony Express Dr. #2706. Parker, CO 80134.

APPENDIX IX: Timeline for CAGT Annual Events

January

- Legislative Day Registration Opens and Closes (approximately 2-3 week time frame)
- CAGT Retreat (annual cycle currently under review)
- Fall CAGT Conference Planning Ongoing - Led by CAGT's President-elect
- CAGT Affiliate Grant Applications Accepted

February

- Legislative Day (Thursday after President's Day Weekend)
- Monthly CAGT Board Meeting
- Fall CAGT Conference Planning Ongoing - Led by CAGT's President-elect
- CAGT Affiliate Grant Applications Accepted

March

- Nominations for CAGT Adult and Student Leadership Awards Open
- Monthly CAGT Board Meeting
- Fall CAGT Conference Planning Ongoing - Led by CAGT's President-elect
- CAGT Affiliate Grant Applications Accepted

April

- Monthly CAGT Board Meeting
- Fall CAGT Conference Planning Ongoing - Led by CAGT's President-elect
- CAGT Affiliate Grant Applications Accepted

May

- Nominations for CAGT Adult and Student Leadership Awards Close
- Monthly CAGT Board Meeting
- Fall CAGT Conference Planning Ongoing - Led by CAGT's President-elect
- Fall CAGT Conference Breakout Session Proposal Submission Window Opens
- CAGT Grant Applications Accepted
- CAGT Affiliate Partnership Program Annual Paperwork Due

June

- Monthly CAGT Board Meeting
- Fall CAGT Conference Planning Ongoing - Led by CAGT's President-elect
- Fall CAGT Conference Registration Opens
- CAGT Affiliate Grant Applications Accepted

July

- Monthly CAGT Board Meeting
- Fall CAGT Conference Planning Ongoing - Led by CAGT's President-elect
- Fall CAGT Conference Breakout Session Proposal Submission Window Closes
- CAGT Grant Applications Accepted
- Colorado Association for School Executives (CASE) Conference Booth for CAGT Advocacy with Superintendents and Central Admin Staff

August

- Monthly CAGT Board Meeting
- Fall CAGT Conference Planning Ongoing - Led by CAGT's President-elect
- CAGT Retreat (review to change cycle underway)
- CAGT Affiliate Grant Applications Accepted

September

- Monthly CAGT Board Meeting
- Fall CAGT Conference Planning Ongoing - Led by CAGT's President-elect
- CAGT Affiliate Grant Applications Accepted

October

- Fall CAGT Conference (Third Sunday-Tuesday of Month)
- Legislative Day Planning Underway - Led by Legislative Committee
- CAGT Affiliate Grant Applications Accepted
- Colorado Association of School Counselors (CASC) Conference Booth for CAGT Advocacy with School Counselors

November

- Monthly CAGT Board Meeting
- Fall CAGT Conference Planning Underway - Led by CAGT's President-elect
- Legislative Day Planning Ongoing - Led by Legislative Committee
- CAGT Affiliate Grant Applications Accepted

December

- Monthly CAGT Board Meeting
- CAGT Holiday Party
- Fall CAGT Conference Planning Ongoing - Led by CAGT's President-elect
- Legislative Day Planning Ongoing - Led by Legislative Committee
- CAGT Affiliate Grant Applications Accepted
- Colorado Association of School Boards (CASB) Conference Booth for CAGT Advocacy with School Boards

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