



AMERICAN SOCIETY OF
SAFETY PROFESSIONALS

Orange County Chapter

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<http://orangecounty.assp.org>

CHAPTER STANDARD OPERATING GUIDELINES

Established June 2005

*Approved by the
Orange County Chapter Executive Committee
(Revision 11: September 20, 2023 under chapter president Brian Nguyen)*

Orange County Chapter of the American Society of Safety Professionals

Standard Operating Guidelines

(Document History: These SOG's were formerly the appendices of the Chapter's Bylaws. During the 2003/04 fiscal year, the RVP suggested that the Chapter's Bylaws mirror Society's, and that anything that dealt with basic chapter operating procedures be removed and placed in the SOGs. Doing so would enable the Executive Committee to modify operating procedures as needed without the need to get a vote by the members.)

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Appendix A: Promotional Use Policy

Responsible Party: As Designated by the Chapter President

Target Audience: All chapter members

Available to: All organizations

Fees: Considerations for promotional agreements, meeting sponsors, website promotions, and other promotions, including associated fees and/or donations, shall be considered on a case-by-case basis by the Executive Committee. However, the following suggestions are provided as a framework for consideration:

Per promotion:

- *\$30 monthly chapter communication*
- *\$150.00 for website spotlight of the month and meeting sponsorship*
- *\$120.00 meeting sponsorship includes:*
 - *Table at monthly meeting*
 - *Time in front of members*
 - *Lunch*

1. The Orange County Chapter will accept promotional assignments which may include:
 - a) *OCASSP Chapter Newsletter*
 - b) *Website*
 - c) *Meeting Sponsorship*
2. Advertisements must be in the form of electronic files capable of being inserted with minimal re-formatting. All advertisements (and appropriate payment) must be received before any promotions are exhibited.
3. The fee may be waived with Executive Committee approval for advertisements from a not-for-profit organization, or for other low-cost or no-cost opportunities deemed by the Executive Committee to be beneficial to the chapter membership.
4. The fee may be waived or modified with Executive Committee approval for advertisements of a specified size (as determined by the Executive Committee) for organizations providing financial sponsorship of a Chapter event.
5. The treasurer shall confirm that payment from the advertising organization has been received prior to including the promotional materials.
6. The Secretary shall document promotional agreements, meeting sponsors, website promotions, and other promotions, including associated fees and/or donations, in the minutes of the Executive Committee meeting following the promotion.

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Appendix B: Treasurer's Best Accounting Practices

PURPOSE: To ensure the Chapter's Treasurer understands and adheres to industry Best Accounting Practices. Adherence to these guidelines will also streamline annual auditing activities.

GUIDELINES:

1. The treasurer should not make a check payable to him or herself. Another authorized chapter officer should review the reimbursement and then write the check.
2. Check the monthly bank account on-line to ensure the membership automatic deposits are made by Society to the chapter's banking account.
3. The check register should record the expense category to which the amount is being charged, and any appropriate details, i.e. Travel-Officer; ROC meeting.
4. The expense category used should reflect those listed on the annual budget.
5. The expense categories used on the income statements and annual financial report should reflect those on the annual budget. The chapter should review the Annual Financial Report from Society to determine if these expense category titles would work on the annual budget.
6. Reimbursement requests and/or invoices with receipts shall be obtained prior to making distribution of reimbursement checks. **RECEIPT REQUIREMENTS:** All expense items over \$10.00 must be supported with a receipt or invoice.
7. The check number and date of check issue should be recorded on all invoices and reimbursement requests.
8. Officers and members are encouraged to find other sources of sponsorship for travel reimbursement. Many companies support professional society involvement as part of their employee continuing education efforts. These companies may also reimburse their employees for travel as part of their professional activities.

Travel Reimbursement Policy

PURPOSE: To ensure efficient processing of travel reimbursement for Orange County Chapter ASSP officers or members who have been authorized to officially represent the Chapter.

POLICY: The Chapter will reimburse members for reasonable and necessary expenses incurred in connection with authorized chapter business.

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PROCEDURES:

1. Prior approval must be obtained from the Chapter President and Chapter Executive Committee for all reimbursable trips. Approval must be noted in the executive committee meeting minutes.
2. Expense reports using the Chapter's Reimbursement Request form (Appendix C) must be submitted to the Chapter Treasurer within 30 days of the conclusion of a trip.
3. Travel arrangements must be made in advance when possible to avoid extra expense for booking hotels, planes and rental cars.

EXPENSE ALLOWANCE:

1. Transportation:
 - a) Air travel: Officers and members should travel by economy class. Effort should be made to secure the most economical fare available. To obtain this, **travel arrangements must be made at least 14 days prior to the trip; except in emergencies. Emergency travel must be approved by two Executive Committee Officers.** The Chapter Treasurer will be available to assist Chapter representatives in purchasing reasonably priced tickets.
 - b) Rental car: Rental car expenses typically are not reimbursable. If a rental car is necessary, prior authorization is required from two Executive Committee Officers. The maximum size/class of vehicle that is reimbursable is an intermediate/mid-sized or similar vehicle. Upgrades will not be reimbursable. Collision Damage waiver insurance must be obtained if a rental car is necessary for chapter business and approved by the executive committee. Collision Damage waiver coverage is reimbursable.
 - c) Personal car: The Chapter will reimburse members who drive their personal automobiles on authorized Chapter business that is approved by the executive committee and noted in the executive committee meeting minutes. The amount of reimbursement will be per the current IRS rate. Chapter members that represent the Chapter on authorized business must maintain a valid California Driver's License and the minimum-required state liability insurance coverage. If air travel is a less expensive alternative, the total amount of reimbursement will be equal to the most economical airfare.
 - d) Other modes of transportation: All other modes of transportation must have prior approval from the Chapter President. In order to be considered these modes of travel must be less expensive than available airfares or personal automobile transportation.
2. Travel insurance: The Chapter does not provide personal travel insurance.

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3. Lodging costs: Lodging expenses incurred when traveling on Chapter business are reimbursable expenses. Accommodations should be obtained whenever possible at a moderately priced, respectable hotel or motel that is convenient for the purpose of the travel. When the chapter business or purpose of the travel has a designated lodging location, lodging at the designated location is deemed reimbursable.
4. Personal meals: When traveling on Chapter business, the reasonable cost of meals -- breakfast, lunch and dinner, including tips, is reimbursable. Personal meals, including drinks and snacks, should not exceed a total of \$75.00 (seventy five dollars) per day per member, including tax and gratuity, and will not be reimbursed over and above that amount. If the meeting being attended includes meals, additional receipts for the same meals will not be accepted.
5. Personal expenses: Personal expenses are not reimbursable, i.e., movies, event entrance fees, cigarettes, alcoholic beverages, reading material, medicine, and laundry charges. This list is not all-inclusive. Most other expenses are not reimbursable unless they fall under the category of transportation, lodging, meals.
6. Other expenses: Other reasonable and necessary expenses to conduct official Chapter business may be reimbursable at the discretion of the Chapter President. Prior approval from the Chapter President is required before incurring such costs.

PERSONAL CREDIT CARDS: Each member is responsible for the payment of his/her personal credit card accounts.

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**Appendix B (1): Student Section Budget and
Reimbursement Procedures**

PURPOSE:

To establish budgeting and accounting procedures for the Orange County Chapter's Student Section at California State University Fullerton.

BUDGETING:

Each Chapter Year (beginning July 1), the Orange County Chapter shall develop a budget for the ensuing chapter year which outlines the Chapter's anticipated operational expenses and revenue. This budget shall be developed by the Chapter Treasurer and approved by the standing Chapter Board of Directors / Leadership Committee. The Chapter Year Budget shall include a line item that estimates the annual expenses of the Student Section.

Each Chapter Year (beginning July 1), the incoming Board CSUF Student Section shall develop and submit to the Orange County Chapter for approval a proposed operating budget that outlines anticipated expenses for the Chapter Year. The Chapter shall review, revise as needed, and approve the Student Section's annual budget at the next meeting following the Student Section Operating Budget submittal.

STUDENT SECTION BUDGET GUIDELINES:

The Orange County Chapter encourages Student Section budgetary autonomy, and the Chapter does not seek to dictate or control the Section activities or expenses. This will allow the Section to operate independently and to make decisions and judgements about how the Section will operate and sustain itself. These guidelines are therefore intentionally vague with regard to what expenses are appropriate and inappropriate. However, Section leaders are required to make prudent and responsible decisions to ensure that budgeted monies are spent in a meaningful manner that supports the Purpose of the Section as outlined in Article II of the Student Section Bylaws.

Examples of routine Student Section operating expenses include but are not necessarily limited to:

- Regular Section meeting expenses (room rentals, meeting supplies, food, etc.)
- Promotional items (awards, logo items, printing and copying expenses)
- Travel expenses for travel approved by the Orange County Chapter. Note: Reimbursement for Student Section related Travel shall follow Appendix B of the Chapter's Standard Operating Guidelines.
- Registration fees for safety-related conferences, seminars, meetings, etc.
- Administrative supplies and costs

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- Other expenses in the approved Student Section Budget that support the Purpose of the Section as outlined in Article II of the Student Section Bylaws.
- The Student Section leadership is encouraged to seek guidance from the Orange County Chapter on financial matters whenever needed.

PROHIBITED STUDENT SECTION EXPENSES:

The following Student Section expenses may not be reimbursed by the Orange County Chapter:

- Alcoholic beverages
- Rental cars. Students are encouraged to use ride services or public transportation when required to travel for approved Student Section or Chapter business.
- Credit card expenses and/or late fees
- Personal expenses such as medicine, laundry charges, cigarettes, etc.
- Note: This list is not all-inclusive. Most other personal expenses are not reimbursable unless they fall under the category of transportation, lodging, meals.

PARTY TO CONTRACT REQUIRES APPROVAL BY CHAPTER

Student Section board members shall not enter into any contract that obligates the Student Section to more than \$1,500 without approval of the Orange County Chapter President and/or the Region I Vice President if required. This includes any contract, purchase order, or other agreement for which the Student Section is liable.

REIMBURSEMENT PROCEDURES FOR STUDENT SECTION EXPENSES:

Student Section expenses are reimbursed by the Orange County Treasurer in accordance with Appendix B and Appendix C of these Standard Operating Guidelines. An elected officer of the Student Section shall complete a Reimbursement Form (Appendix C) to the Orange County Chapter Treasurer along with supporting documentation (e.g., receipts) within 30 days of incurring the expense. If the expense falls within the scope of the approved Student Section Operating Budget, the Orange County Chapter Treasurer shall review and approve the request and issue a check for reimbursement, or request additional information if needed, within 7 days of receiving the request.

Student Section expenses and expenditures that fall outside the scope of the approved Student Section Operating Budget shall be approved by the Orange County Chapter Board of Directors prior to the expense being incurred. Expenditures that fall outside the scope of the approved Student Section Operating Budget that are not pre-approved by the Orange County Chapter Board of Directors may not be reimbursed and may be the responsibility of the Student Section member incurring the expense without pre-approval.

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**Appendix C: Reimbursement Form
OCASSP CHECK REQUEST/EXPENSE REIMBURSEMENT**

DATE: _____ SUBMITTED BY: _____ AMOUNT TO BE PAID: \$ _____

MAKE CHECK PAYABLE TO: _____

MAILING ADDRESS: _____

PURPOSE OF REQUEST: _____

Please submit the Reimbursement Request form and the receipts within 30 days of the conclusion of a trip. You can email them to treasurer@orangecounty.assp.org

APPROVED BY: (1) _____ (2) _____

EXPENSE REPORT SUMMARY

	DATE	DESCRIPTION	LODGING	MEALS	TRANSPORTATION	OTHER
1	_____	_____	_____	_____	_____	_____
2	_____	_____	_____	_____	_____	_____
3	_____	_____	_____	_____	_____	_____
4	_____	_____	_____	_____	_____	_____
5	_____	_____	_____	_____	_____	_____
6	_____	_____	_____	_____	_____	_____
7	_____	_____	_____	_____	_____	_____
8	_____	_____	_____	_____	_____	_____
9	_____	_____	_____	_____	_____	_____
10	_____	_____	_____	_____	_____	_____
		SUBTOTALS:	_____	_____	_____	_____

GRAND TOTAL: _____

CHAPTER TREASURER USE ONLY

CHECK#: _____ AMOUNT: _____ DATE PAID: _____

ACCOUNT(S) TO BE CHARGED	AMOUNT	ACCOUNT(S) TO BE CHARGED	AMOUNT
Administration	_____	Monthly Meeting Expense	_____
Awards, Honors, Scholarships	_____	Office Expenses	_____
Donations	_____	Officer Travel	_____
Holiday Meeting Expense	_____	PDC Expense	_____
JTS Expense	_____	Recognition	_____
Leadership Conference	_____	ROC 1 Networking Event	_____
Meals and Entertainment	_____	Student Section	_____
Membership Expense	_____	Other: _____	_____
Mixer Expense	_____	Other: _____	_____
		TOTAL:	_____

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Appendix D: Routine Chapter Communications

- Section 1. The Chapter shall maintain certain tools for communicating with the membership (herein referred to as communication tools). These tools shall include the following:
- a) A list of electronic mail addresses (herein referred to as an e-mail list) for all members having e-mail access, all Regional Operating Committee members and members of other ASSP chapters who wish to receive information about Chapter events. The e-mail list is maintained by the Society, and is accessible through Society's "Officer Central" by authorized Executive Committee members.
 - b) A website containing information regarding the Chapter, its purpose and activities. The webpage is to be maintained by a person or company as appointed by the Chapter President. If a Chapter member is not available to maintain the Chapter website, a paid contractor may be used if so approved by the Executive Committee.
 - c) A periodic newsletter or social media posts containing information about the upcoming technical meetings/events, items of Chapter business and other information of interest to the membership. Communications shall be prepared by a Newsletter Editor who may be any Chapter member (including current Executive Committee members) or any other member of the Executive Committee authorized by the Chapter President.
- Section 2. Routine communications shall include the following:
- a) E-mailing or similar broadcasting of announcements of any upcoming Chapter events.
 - b) E-mailing or similar broadcasting of announcements and reminders (as needed) of any upcoming Chapter events.
 - c) Announcements of various information and events approved by way of the procedures outlined in Appendix B above.
- Section 3. Communications listed in Section 2 of this Article shall be performed at the discretion of the responsible person(s) listed in Section 1 of this Article. Any other communications to Chapter members must be approved by the Executive Committee.

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Appendix E: Awards & Honors, Safety Hall of Fame

DESCRIPTION

The Orange County Safety Hall of Fame is dedicated to fostering an appreciation of safety leaders in Orange County by honoring those who have made outstanding contributions to the advancement of safety and health and recognizing their impact on the profession and in our community.

Through its mission, the Orange County Safety Hall of Fame is committed to:

- Honoring those individuals who have had exceptional careers, and recognizing them for their significant achievements.
- Accepting, through petitions, individuals who meet the eligibility guidelines as set forth herein for induction into the Safety Hall of Fame.
- Maintaining a permanent record of these individuals with documentation, maintenance of the original nomination petition, and periodic exhibition of the perpetual plaque that enshrines each inductee.

NOMINEE ELIGIBILITY

Nominees must be in good standing as a Member, Emeritus Member, or Professional Member of the American Society of Safety Professionals. Nominees must have membership tenure of at least fifteen (15) years, with at least five of the most recent years being with the Orange County Chapter. Exceptions to eligibility requirements must be approved by the Awards & Honors Committee.

GENERAL CRITERION

Nominees must have made a consistent significant and measurable positive impact on the safety and health of the workers in Greater Orange County by demonstrating exemplary service in the general field of safety or one of its specialties.

Nominees must have demonstrated the highest level of technical skill and innovation.

Nominees must have demonstrated progressive responsibility and management in the safety profession.

NOMINATION GUIDELINES

Nominations must be made by any Orange County Chapter Member or Professional Member in good standing.

The nomination petition must be submitted in essay form by the nominating member and should fully explain in detail the nominee's qualifications as outlined in the General Criterion above. The petition should also explain why the nominee is deserving of this honor.

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The petition must include at least two (2) letters of support from supervisors or peers, special citations, honors, awards, or other supporting documents relevant to the nomination guidelines. The petition must be signed and dated by the nominating member. For archival purposes, the petition should be attractively and professionally packaged and presented.

The essay portion of the nomination petition must be no more than fifteen (15) pages, double spaced, with 10 point type or larger standard font type (such as Arial, Courier, or Times New Roman). The total petition, including supporting documentation, must be 25 pages or less. One (1) hardcopy original and two (2) photocopies of the complete petition must be mailed to:

Safety Hall of Fame – Awards & Honors
c/o Orange County Chapter ASSP
P.O. Box 27932
Santa Ana, CA 92799-7932

Please do not mail in a manner that requires a signature to receive the package.

Electronic submissions may be compiled into one PDF document and emailed to phillipcombest@gmail.com.

NOMINATION TIPS

There are dozens of chapter members who are eligible for nomination to the OCASSP Safety Hall of Fame based on their length of service and membership with the Chapter and ASSP. A list of chapter members with election dates prior to 15 years ago may be obtained from Society. After obtaining this list, examine it to identify those members who have been active in attending Chapter meetings and events or those members who have been prominent in the Greater Orange County Professional Safety Community.

After a possible candidate has been identified, the candidate may be approached by the petitioner for assistance in gathering the data necessary to draft the petition.

INDUCTION PROCEDURES

Upon receipt of the nomination petition, the petition shall be forwarded to the Director of Awards & Honors. The Awards & Honors committee shall review the petition for completeness and eligibility and, if appropriate, recommend conferment to the Chapter Executive Committee. Conferment shall be affirmed by a simple majority vote at the next regular meeting of the Executive Committee.

The nominee, nominating member, and the nominee's supervisor (if applicable) shall be invited to attend the meeting for the induction ceremony. If the December meeting is not feasible, these parties shall be invited to the next monthly Chapter meeting at which

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performance of the induction ceremony if feasible and convenient for the both the Chapter and inductee.

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**Appendix F: Awards & Honors, Chapter Safety
Professional of the Year (Chapter SPY) Award**

DESCRIPTION

The purpose of the Safety Professional of the Year (SPY) Award is to pay tribute to the outstanding accomplishments of Society professionals engaged in the broad field of occupational safety and health.

ELIGIBILITY

To be eligible for this award, the nominee must:

1. Be a Professional Member or Member of the Society
2. Be engaged in full time employment in the broad profession of safety, health, and environmental engineering
3. Not have received this award within the past five years
4. Be an active dues-paying member of the Chapter of the Society

NOMINATION PROCEDURES

1. Nomination for the SPY Award must be made by a Professional Member, Member or Associate Member in good standing of the Chapter.
2. The completed petition may be submitted at any time during the Chapter Year.
3. A petition when will be reviewed and the candidate selected by the Awards & Honors Committee within 30 days of receipt. The Awards & Honors Committee may request additional information from the sponsor as needed. If more than one petition is received, judging and selection will be based on the candidate's past five years of service to the professional community and to the Chapter. (This five year deadline is strictly adhered to by the Society Awards & Honors Committee.)
4. The selected candidate will receive a commemorative plaque, a letter of congratulations from the chapter president, and a \$250 (two-hundred fifty dollar) honorarium for the award. The selected candidate will be presented the award and honorarium at the most convenient subsequent meeting.
5. The petition may be submitted without the candidate's knowledge. If another is selected, there is no disappointment. On the other hand, this may not be feasible because the candidate's involvement may be needed in order to prepare the best possible petition.
6. Exceptions to these guidelines may be made by a majority vote of a quorum of the standing Executive Committee at any regular meeting or special meeting called by the presiding officer.

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PETITION REQUIREMENTS

The petition should not be more than 15 pages, double-spaced (not including work samples and letters of reference or recommendation letters). The recommended outline and format for the petition is provided below.

The petition should identify the candidate and provide the following information:

1. Candidate Name, Address, and Phone Number
2. Candidate Company Name, Position Title, Description, and Duties
3. Candidate's Supervisor and Supervisor's Phone Number
4. Endorsements by superiors, associates, and/or colleagues in the form of letters on appropriate stationery.
5. The attached declaration by the member who is petitioning.

REGIONAL SPY NOMINATIONS

Each chapter year, when the Regional Vice President calls for Regional SPY Nominations, the chapter Awards & Honors Committee should work with the chapter SPY recipient from the preceding chapter year (if available) to modify the chapter SPY's nomination petitions needed to meet the Regional SPY nomination petition format guidelines and forward his or her petition, along with an endorsement letter from the chapter president, to the Regional Vice President for consideration of the Regional SPY award.

When there is no chapter SPY recipient selected from the prior chapter year, a call for nominations should be made to the chapter membership in a timely manner, or the petition for the standing Chapter SPY from the prior year shall be forwarded for consideration as the Regional SPY.

Endorsements by the chapter president of the Regional SPY petitioners shall be made at the discretion of the chapter president and the standing executive committee.

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SAFETY PROFESSIONAL OF THE YEAR PETITION DECLARATION

PETITIONER DECLARATION

As the petitioner of this Safety Professional of the Year nomination, I have completely reviewed the petition, and I believe all statements contained therein to be an accurate and faithful reflection of the nominee's safety activities in the Society, for an employer, and in the community.

Petitioner Signature _____ *Date* _____

NOMINEE DECLARATION

As the nominee, I have completely reviewed the Safety Professional of the Year petition, and I believe all statements contained therein to be an accurate and faithful reflection of my safety activities in the Society, for an employer, and in the community.

Nominee Signature _____ *Date* _____

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**Appendix G: Awards & Honors, Professional
Certification Reimbursement Award**

DESCRIPTION

This award is intended to reimburse chapter members for costs associated with pursuing professional certification, such as examination fees and study materials, in an amount up to \$500.

ELIGIBILITY

- Applicants must be a member in good standing with Orange County Chapter with membership tenure of no less than one year.
- Applicants must be registered to take or must have already taken one or more of the exams required to achieve professional certification as described below in the General Criterion section.
- The applicant must not be reimbursed for the cost associated with pursuing professional certification by any other source, such as the applicant's employer.
- The applicant may not be a previous recipient of this award.

GENERAL CRITERION

- This award will be granted one time per year.
- The candidate must not have incurred the expenses for which reimbursement is applied more than 2 years prior to the filing deadline.
- The candidate must be pursuing or must have achieved a recognized professional certification that is related to the broad field of environmental safety and health. Examples of recognized professional certifications include, but are not necessarily limited to:
 - AEP - Associate Ergonomics Professional
 - AHFP - Associate Human Factors Professional
 - ARM - Associate in Risk Management
 - ASP - Associate Safety - Professional
 - CAIH - Certified Associate Industrial Hygienist
 - CEA - Certified Ergonomics Associate
 - CET - Certified Environmental, Safety & Health Trainer
 - CFPS - Certified Fire Protection Specialist
 - CHFP - Certified Human Factors Professional
 - CHMM - Certified Hazardous Materials Manager

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- CHP - Certified Health Physicist
 - CHST - Construction Health and Safety Technologist
 - CIH - Certified Industrial Hygienist
 - CPE - Certified Professional Ergonomist
 - CRM - Certified Risk Manager
 - CSP - Certified Safety Professional
 - GSP - Graduate Safety Practitioner
 - OHST - Occupational Health and Safety Technologist
 - PE - Professional Engineer in Safety
 - STS - Safety Trained Supervisor
 - STSC - Safety Trained Supervisor Construction
- Other certifications will be considered by the Awards & Honors Committee upon receipt of the award application. Related certifications with accreditation by a recognized certifying body such as the Council of Engineering and Scientific Specialty Boards (CESSB) will be preferred. Awards for reimbursement of expenses incurred in pursuing professional certifications other than those named above will be at the sole discretion of the Awards & Honors Committee.

APPLICATION GUIDELINES

- A cover letter describing the certification being pursued and a complete OCASSP Awards application should be mailed to the OCASSP Awards & Honors Committee, P.O. Box 27932, Santa Ana, CA 92799-7932. Please do not mail in a manner that requires a signature to receive the package. Electronic submissions may be compiled into one PDF document and emailed to phillipcombest@gmail.com.
- Copies of the receipts for the expenses associated with pursuing the professional certification should be included with the application. The award will not be granted until the expenses are incurred and copies of receipts are provided to the Awards & Honors Committee.
- The application should include the self-employment verification or a statement from the applicant affirming that the applicant's employer does not reimburse the costs associated with pursuing professional certification.
- Applications may be sent any time during the chapter year.

TIPS FOR LOCATING CANDIDATES

Members of the Awards & Honors Committee should make this award program known by advertising in the chapter newsletter and announcing the program at monthly luncheons and events.

Many chapter members pursue professional certification. Some of these members are not reimbursed for the costs associated with pursuing these certifications, or they are

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unemployed or self-employed. Chapter Executive Committee members or other chapter members may be able to provide information leading to other members who might be qualified for and/or interested in this award.

The ASSP Consultants Practice Specialty may be able to put the Awards & Honors Committee in touch with chapter members who are self-employed consultants, and some of these members may be qualified for and/or interested in this award.

SELECTION AND AWARD PROCEDURES

- Reimbursement of certifications expenses will be awarded to qualifying applicants on a first-come, first-served basis.
- If more than one qualifying application is received, the recipient will be chosen at random from the pool of qualifying applications in the presence of a quorum of the Awards & Honors Committee.
- Upon selection of the qualifying candidate, the selected candidate will be notified by a member of the Awards & Honors Committee. Any applicants who are not selected will also be notified by a member of the Awards & Honors Committee.
- The selected candidate will be invited to attend the next available regular OCASSP meeting to be recognized and awarded the Professional Certification Award. If the selected candidate does not wish to be recognized publicly, the award shall be provided privately to the selected candidate.

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**Appendix H: Awards & Honors, Membership Dues
Reimbursement**

DESCRIPTION

This award is intended to reimburse chapter members for costs associated with chapter membership, up to \$180.00.

ELIGIBILITY

- Applicants must be a member in good standing with Orange County Chapter with membership tenure of no less than one year.
- The applicant must not be reimbursed for the cost associated with ASSP membership by any other source, such as the applicant's employer.
- Applicants for this award may be previous recipients of the award. However, preference shall be given to applicants who are not previous recipients when there are more than five applicants in a chapter year.

GENERAL CRITERION

- This award will be granted up to five (5) times per chapter year.

APPLICATION GUIDELINES

- A complete OCASSP Awards application should be mailed to the OCASSP Awards & Honors Committee, P.O. Box 27932, Santa Ana, CA 92799-7932. Please do not mail in a manner that requires a signature to receive the package. Electronic submissions may be compiled into one PDF document and emailed to phillipcombest@gmail.com.
- Copies of the receipts for the expenses associated with pursuing the professional certification should be included with the application. The award will not be granted until the expenses are incurred and copies of receipts are provided to the Awards & Honors Committee.
- The application should include the self-employment verification or a statement from the applicant affirming that the applicant's employer does not reimburse the costs associated with pursuing professional certification.
- Applications may be sent any time during the chapter year.

TIPS FOR LOCATING CANDIDATES

- The ASSP Consultants Practice Specialty may be able to put the Awards & Honors Committee in touch with chapter members who are self-employed consultants, and some of these members may be qualified for and/or interested in this award.

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**Appendix I: Awards & Honors, Student Scholarship
Award**

DESCRIPTION

This award is intended to provide students pursuing a career in the safety, health, and environmental profession an unrestricted grant in the amount of \$500 (five hundred dollars) as well as ASSP membership for one year (if the applicant is not yet a member of ASSP).

A maximum of 6 (six) Student Scholarship Awards will be granted each year, unless approved by and budgeted for by the current chapter Executive Committee.

ELIGIBILITY

- Applicants must be a resident of Southern California and have a permanent home address with a Zip Code between 90000 and 93599.
- Applicant must be currently enrolled and attending as a student a degree granting institution and pursuing a degree in a program leading to a career in the broad profession of safety, health, and environmental engineering.
- The applicant may not be a previous recipient of this award.

GENERAL CRITERION

- Applicants must have accumulated college credit to be considered at the sophomore level or higher (having completed 30 or more credit hours).
- Applicants should possess a cumulative, overall grade point average of 3.0 or higher for courses in safety, health, and environmental engineering, or the applicant should include an explanation of a lower grade point average in the required cover letter.
- Exceptions to these criterion shall be approved by the Awards & Honors committee.

APPLICATION GUIDELINES

- A completed OCASSP Awards application, including all required attachments, should be sent to the OCASSP Awards & Honors Committee, P.O. Box 27932, Santa Ana, CA 92799-7932. Please do not mail in a manner that requires a signature to receive the package. Applications may be submitted electronically to: phillipcombest@gmail.com. If application is emailed, all required documentation should be compiled into one single PDF file.
- The application should include a cover letter expressing interest in the Student Scholarship Award and intent to enter the safety, health, and environmental profession.

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- The application should include a letter of recommendation or reference from one of the following: the applicant's faculty advisor; any past or present professor; any past or present colleague; any other individual that may recommend the applicant for consideration of the award. Note: The letter of recommendation or reference must include the writer's signature (e.g., scan).
- The application should include current copies of the applicant's transcripts. (Note: unofficial transcripts or photocopies are acceptable.)
- Applications must be postmarked (if mailed) or timestamped (if submitted electronically) no later than November 1 to be considered for this award in the fall and no later than March 1 to be considered for this award in the spring.

TIPS ON LOCATING QUALIFIED APPLICANTS

We have a couple of highly respected institutions from which we have drawn support in locating candidates in the past.

- California State University Fullerton (CSUF) has health science programs with an occupational safety and health tracks that may qualify for our Student Scholarship Program. CSUF has been very helpful in locating qualified candidates for our Student Scholarship Award in past years. At this time of this writing, contacts for assistance from CSUF are as follows:

Danny H. Kim, PhD, Associate Professor / Dept. of Health Science,
(657) 278.5649, dannykim@fullerton.edu

The Current OCASSP / CSUF Student Section President.

- California State University Northridge (CSUN) has a bachelor's degree program as well as a master's degree program in Environmental and Occupational Health (EOH) and other related specialties, including Industrial Hygiene. CSUN has been very helpful in locating qualified candidates for our Student Scholarship Award in past years.
- Other local community colleges may be suitable resources for locating scholarship applicants. For example, some students may be completing undergraduate work at a community college in the broad area of safety while preparing for a university transfer.

SELECTION AND AWARD PROCEDURES

- Three (3) awards will be offered in the fall, and three (3) awards will be offered in the spring. If three awards are not granted in the fall, the unused awards will be carried over and offered in the spring in addition to the scheduled spring awards. Exceptions shall be approved by and budgeted for by the current chapter Executive Committee.

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- In cases where there are more qualified applicants than awards to be given, the recipient shall be chosen by lottery conducted by the Awards & Honors Committee.
- In cases where there are more qualified applicants than awards to be given, preference shall be given to applicants who are members of OCASSP's Student Section at California State University, Fullerton.
- When the candidate is selected, the candidate should be provided an ASSP membership application to complete (if applicable). The completed application, whether it is a student application or regular application, should be forwarded to Society headquarters with payment in full by the Chapter Treasurer.
- The Awards & Honors Committee is encouraged to invite the selected candidate and two guests of their choice to attend a recognition ceremony at which the grant is awarded. Additionally, consideration should be given to inviting the student's faculty advisor to support the student and to be recognized for their support of OCASSP.

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**Appendix J: Awards & Honors, Long Term Service
Honorees**

BACKGROUND:

Each year around October, someone from Society contacts the chapter president and asks whether we would like to have Society mail the chapters' Long Term Service certificates to the recipients, or would the Chapter rather receive the certificates so we may present them to the honorees. We have historically elected to receive these so that we may invite the recipient to the December Dinner or January meeting.

PROCEDURES:

- a) The Awards & Honors Chair will collect certificates for long term service members, mount the certificates as appropriate and prepare a presentation for each recipient.
- b) Each honoree will be invited by the Awards & Honors chair to attend as a guest of honor the December meeting along with a guest of their choice such as a coworker, parent, friend, child, spouse, or significant other, at no charge.
- c) The Awards & Honors chair will gather information about the long term service members prior to the meeting in order to make a presentation that distinguishes and honors the recognition recipient.
- d) Chapter may, with approval, provide additional accommodations to the recipients based on their unique circumstances. This could include but may not be limited to: paying for overnight lodging for recipients traveling from over 50 miles away; allow the recipient to have more than one guest with them at no charge; and providing additional recognition tokens for extremely long service honor recipients such as plaques or other personalized gifts.

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Appendix K: Scholarship & Awards Application



AMERICAN SOCIETY OF
SAFETY PROFESSIONALS
Orange County Chapter

P.O. Box 27932, Santa Ana, CA 92799-7932
<http://orangecounty.assp.org>

Name _____ Are you an
ASSP
Member # _____
*Required except for
Scholarship application*

Last First MI

Employer _____ Title _____

Mailing
Address _____
Street Address Apt. /Suite/Unit #

City State ZIP

Phone () - e-mail
address _____

Complete the appropriate section for the program you are applying for (one program per application only)

☐ **Professional Certification Reimbursement Award:** *100% up to \$500 of the cost of the application, examination fee for certification, prep course and study material.*

Certification pursued:

(Subject to approval) Certifying
Body _____

☐ **Student Scholarship:** *\$500.00 and student membership in ASSP for one year.*

School _____ Major _____

Degree ☐ AS/AA ☐ BS/BA ☐ MS/MA ☐ PhD ☐ Other _____

Year in School _____ Expected Graduation Date ____/____/____

Full Time Student ☐ Yes ☐ No

Cumulative GPA _____ Cumulative GPA in Safety & Health related courses _____

☐ **Membership Dues Reimbursement Award:** *100% up to \$180.00 of the cost of the annual ASSP membership dues.*

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Scholarships & Awards Application

Award Eligibility Requirements and Checklist

Professional Certification Reimbursement Award

Eligibility

- ASSP Orange County Chapter Member (all categories of membership) in good standing for at least one year.
- Candidate must have taken exam or be registered to take a professional certification examination within the scope of certifications and criteria listed in the limitations section.
- Candidate's is not reimbursed by any other source.
- Must not be a previous recipient of this award.

Submit the following:

- ☐ Completed application form (Appendix K including Eligibility Requirements and Checklist)
- ☐ Proof of registration.
- ☐ The candidate must remit all related receipts (or copies of receipts) in order to complete the award process and get reimbursed.
- ☐ Professional Certification Award Application - Declaration.

Student Scholarship

Eligibility

- Students with permanent home address as Southern California. Zip codes 90000 to 93599.
- Applicants is a student attending a degree granting institution and admitted/enrolled in a safety program.
- Applicants must be enrolled at the sophomore level or higher and be seeking a career in Occupational Safety and Health.
- Applicants must possess a cumulative, overall 3.0 GPA for safety & health courses, or a GPA lower than 3.0 should include an explanatory note from the applicant.

Submit the following:

- ☐ Completed application form (Appendix K including Eligibility Requirements and Checklist)
- ☐ Cover letter indicating consideration for scholarship and indicating career objectives in safety (maximum one 8-½ X 11 page).
- ☐ Original, official Transcript (or unofficial copy) which shows the coursework in safety or related fields.
- ☐ Resume
- ☐ A letter of recommendation from the applicant's Faculty Advisor or other person who knows the applicant.

Membership Dues Reimbursement

Eligibility

- Applicants must be a member in good standing with Orange County Chapter with membership tenure of no less than one year.
- The applicant must not be reimbursed for the cost associated with ASSP membership by any other source, such as the applicant's employer.
- The applicant may not be a previous recipient of this award.

Submit the following:

- ☐ Completed application form (Appendix K including Eligibility Requirements and Checklist)
- ☐ Proof of payment of membership dues (or a copy of the receipt)
- ☐ Membership Dues Reimbursement Award Application - Declaration.

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CERTIFICATION OF APPLICANT:

To be completed by award applicant

I certify that I have read, understand and meet the eligibility requirements for the award I am applying for and that all information provided on and with this form is correct to the best of my knowledge.

<i>Signature</i>	/ /
------------------	---------

Mail all application materials to:

**Awards & Honors Chair
OCASSP
P.O. Box 27932
Santa Ana, CA 92799-7932**

Electronic submissions may be emailed to:

**Awards & Honors Chair
phillipcombest@gmail.com**

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**AMERICAN SOCIETY OF
SAFETY PROFESSIONALS**

Orange County Chapter

P.O. Box 27932, Santa Ana, CA 92799-7932
<http://orangecounty.assp.org>

Professional Certification Award Application - Declaration

To be completed by applicant

Name		ASSP	
		Member #	
	<i>Last</i>	<i>First</i>	<i>MI</i>

Professional Certification Description

Certification or Designation Title	Units/ CEUs
Provider	
Telephone #:	
Address	
<i>Street Address</i>	<i>Apt./Suite/Unit #</i>
<i>City</i>	<i>State</i>
	<i>ZIP</i>

To be completed by employed applicant

Signature
Date

Signature
Date

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Membership Dues Reimbursement Award Application - Declaration

To be completed by applicant

Name _____ ASSP
Member # _____
Last First MI

Email Address _____

Phone () _____

To be completed by employed applicant

Employer _____ Title _____

I declare that the cost of membership dues requested for reimbursement are not reimbursed by my employer, nor will I receive any other reimbursement for such costs from any other sources.

Signature *Date*

To be completed by self-employed or not currently employed applicant

I declare that I am self-employed or not currently employed and that the costs of my ASSP membership dues listed above will not be reimbursed by any other source.

Signature *Date*

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Appendix L: E-Motion Procedures

HISTORY:

These procedures have been developed to standardize the process of submitting “motions” through e-mail in order to allow adequate time for all members of the executive committee to access and review the motion and respond. It was also established to ensure that the individual submitting the motion has given complete thought to the potential financial and/or staff time impacts. The ultimate goal is to ensure the Executive Committee remains good stewards of the Chapter’s finances and time.

E-MAIL MOTION.

Since the Board meets on a monthly basis, the need for an e-motion/e-vote should be clearly restricted to only time-sensitive items. Executive Committee members shall restrict the use of e-motions/e-votes to only those issues for which decision delays are not in the Chapter’s best interests. The Presiding Officer shall validate or invalidate e-motions as needed to maintain smooth and effective Chapter operations and to prevent unnecessary and/or frivolous e-traffic within the Executive Committee.

RECORDING OF E-MOTIONS

The Chapter Secretary shall document for the record the e-motion and any associated business transacted in the minutes for the next regularly scheduled meeting of the Chapter Executive Committee.

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**Appendix M: (Placeholder) Officer and Director
Transition Procedures**

(Heading 2): President

(Heading 2): President-Elect

(Heading 2): Secretary

(Heading 2): Treasurer

Include bank card signature procedures.

(Heading 2): Delegate

(Heading 2): Others?

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Appendix N: PO Box and Key Procedures

PURPOSE:

The Chapter uses a USPS Post Office Box for certain hardcopy correspondence and, therefore, must periodically pay the box rental fee and have Executive Committee members with keys check the box.

PO BOX LOCATION:

The Chapter's PO Box is located at 3101 West Sunflower Avenue, Santa Ana, CA 92799. (Corner of Susan Drive)

The Chapter's box number is number 27932. This is located in the central bank of boxes on the left-hand side around eye level.

KEY HANDLING:

The Post Office issues two (2) key for the PO Box. These keys should be issued to appropriate Executive Committee members based on their need to check the mail and/or geographical convenience and proximity to the box location. When/if keys are passed among Committee Members, the SOGs should be appropriately updated below to reflect the change of possession.

As of the beginning of the 2020/2021 Chapter Year, keys are issued to the following Executive Committee Members:

Phillip Combest
Georgette Quinn

POST OFFICE RENTAL FEE:

The rental fee is due by the end of February each year. This date shall be incorporated into the Chapter's SOG regarding "KEY CHAPTER DATES" located in Appendix P.

The annual fee as of February 2020 was \$92.00. No more than one year may be paid at a time. If the PO Box rent is not paid on time, there is a significant late fee imposed.

Anyone may pay this fee to the clerk at the Post Office during normal business hours (7:00 a.m. to 7:00 p.m. Monday through Friday).

The expense may be paid with a Chapter Check obtained ahead of time, or the paying member may pay out of pocket and be reimbursed in accordance with SOG addressing expense reimbursement.

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**Appendix O: (Placeholder) Website and
Communications Management**

Procedures for updating website, sending communications using ConstantContact or MailChimp or whatever medium we are using.

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Appendix P: Key Chapter Dates (Placeholder)

PRESIDENT

- ~~a) July 31, 2021: Review Chapter Operational Plan with Chapter Leadership Committee.~~
- ~~b) August 15, 2021: (changed from June 30) Chapter Operations Management Tool (Annual Planning Template) due to the Regional Vice President and Society Headquarters~~
- ~~c) December 31, 2021: Appoint nominating committee for next chapter year.~~
- ~~d) March 1, 2022: Chapter Dues Report Form due if chapter is changing membership dues.~~
- ~~e) May 31, 2022: Officer and Delegate names due for the ensuing chapter year (from bylaws)~~
- ~~f) Before June 30, 2022, Host transition/planning meeting and plan for installation ceremony to be held at July meeting.~~

PRESIDENT-ELECT

- ~~a) Before June 30, 2022, Review Chapter bylaws and SOGs with incoming leadership team. When changes to bylaws are under consideration, provide a draft to RVP for review and input before the Chapter votes on the changes.~~

TREASURER/FINANCIAL REPORTS

- ~~a) May 31, 2022, Treasurer's Annual Financial Report~~
- ~~b) May 31, 2022, Treasurer's Financial Checklist~~

AWARDS & HONORS

- ~~a) November 1, 2021: Fall Scholarship Must Be Postmarked and Submitted~~
- ~~b) November 1, 2021: Submit applications to Society for Safety Professional of the Year (SPY), Society Fellow, and Outstanding Educator Award.~~
- ~~c) February 1, 2022: Deadline for submitting Regional SPY applications.~~
- ~~d) March 1, 2022: Spring Scholarship Applications Due~~

POST OFFICE RENT DUE

- ~~a) February 28, 2022 (Must be paid onsite)~~

NOMINATING COMMITTEE CHAIR

- ~~a) March 15, 2022: Communicate Slate of Officers for following chapter year so elections may be done in April.~~

OTHER

- ~~a) October 21-22, 2021: Leadership Conference (**online**)~~
- ~~b) October: Joint Technical Symposium, Carson, CA (**Postponed to 10/19/22**)~~
- ~~c) 2021 Future Safety Leaders Conference, Chicago Marriott Oak Brook in Oak Brook, IL (**in-person event canceled for 2021, possible event online**).~~
- ~~d) April 30, 2022: Student Section to submit yearly summary report (activities and finances)~~
- ~~e) June 27-29, 2022: Safety 2022 (Professional Development Conference & Exposition), Chicago, IL (**also online**)~~
- ~~f) Before June 30, 2022, Transfer all chapter administration materials to incoming chapter officers (All outgoing Chapter Officers)~~

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**Appendix Q: Document Retention Policy and
Procedure**

OVERVIEW

OCASSP records are important assets and records include both paper and electronic. The law requires the organization to maintain certain types of records for a specific period of time. Failure to comply could result in penalties and it is important that members comply with these requirements.

OCASSP developed a google documents account in January 2015 to keep the chapters documents electronically. The existing paper documents were gone through and scanned and added to the goggle documents database or disposed.

RESPONSIBLE PARTIES

Only those persons responsible for keeping chapter records shall have access to the goggle documents account. A member whose chair responsibilities for their chapter year shall have access to the goggle documents account so they can keep the necessary documentation according to the record retention requirements. The access will change each board year according to who will be the chair person responsible. These members will be but not exclusive too:

- President
- President-Elect
- Secretary
- Treasurer
- Awards & Honors Chair
- Communications Chair
- Goggle Documentation Chair

RECORD RETENTION REQUIREMENTS

1. Keep for one year
2. Keep for three years
 - a. General correspondence
 - b. Annual operating documents
 - c. Scholarship applications
 - d. Scholarship selection committee
3. Keep for five years
4. Keep for seven years
 - a. Accounts receivable and payable ledger
 - b. Expired contracts and leases (from settlement date)

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- c. Donations and funded grants
 - d. Invoices and purchase orders
 - e. Tax statements
 - f. Bank statements and reconciliations
5. Keep for ten years
6. Keep records permanently
- a. Articles of incorporation, charter, bylaws, minutes and other incorporation records
 - b. Audit reports, financial statements, journals, chart of accounts
 - c. Contracts still in effect
 - d. Legal and other important correspondence
 - e. Trademark registrations and copyrights
 - f. Scholarship recipient information
 - g. Internal audit reports

CONFIDENTIALITY REQUIREMENT

Many records subject to record retention requirements contain confidential information. Such records are private and should be considered confidential.

DISPOSAL AND DESTRUCTION OF RECORDS

If it is determined that it is appropriate to dispose of certain records they should be destroyed in one of the following ways:

- Recycle non-confidential paper records
- Shred or otherwise render unreadable confidential paper records
- Erase or destroy electronically stored data