

**Policy # 14-96**

**Date:** January 14, 2019

<b>Policy: CMSNE Extension Financial Responsibilities</b>
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1. Case Management Society of New England (CMSNE) will provide a new approved Extension with \$1000 “seed money” to aid in establishing initial meetings, speakers, and other start up expenses.
2. The Extension Chair/Co-Chairs will make written requests to the CMSNE Treasurer for periodic disbursement of funds (up to the fiscal maximums outlined below) for Extension purposes. The CMSNE Treasurer will maintain records to account for the allocation of funds.
3. The Extension may engage in fund raising activities as identified in Policy #13-96, “Extension responsibilities”. All revenues generated by the Extension must be reported and forwarded to the Chapter Treasurer at the Chapter office who will maintain an accounting of the Extension finances.
4. Revenues obtained by the Extension as a result of Board of Directors approved Extension activities (Refer to P&P #13-96; CMSNE Extension Responsibilities) will remain the property of the Extension, unless and until those revenues exceed \$2000. If the Extension is able to generate revenues greater than \$2000 then the Extension at year end will be required to turn over monies in excess of \$2000 to the Chapter or submit a proposal to the Board of Directors regarding specific plans for use of the excess funds. Proposal should include all program budgetary details.
5. Extensions with treasury balances below \$2000 at year end will be able to submit a proposal to the Board of Directors regarding specific requests for use of the additional funds. Proposal should include all program budgetary details.
6. All Extension programs must be developed and coordinated with budgetary calculations taken into consideration. All efforts to seek sponsorship of program, speaker, continuing education units, food and/or site should be taken into consideration. Registration should be reflective of expenses associated with the program, with a consideration of a reduced rate for members as a benefit of membership, while non-members are charged a high fee. Extension programs should be self-sustaining through sponsorship and registration revenues.
7. Any fiscal exchange other than those described above must be approved in writing by the President with the consent of the Board of Directors.

Signed Off:

*Mary Mc Clintock RW, MSW, CCM*  
Mary McClintock, Chapter President, 2017-19  
CMSNE

Date: 1/15/19