



The Book : Chapter Officers

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Officer Orientation

The role of chapter officers is to serve as a voice for the general membership and consolidate the energy of the members and community to achieve preset goals.

The job descriptions in this section of *The Book 2002* are intended to serve as guidelines. Each chapter will determine what each officers' specific responsibilities will be.

Because of the intricate set of local, state, and federal laws governing not-for-profit organizations, The United States Junior Chamber recommends that office holders, either through qualified legal counsel or knowledgeable private legal counsel, fully understand the applicable laws and subsequent officer liabilities.

Every officer, regardless of position, is responsible to:

- Personally recruit and promote recruitment of new members.
- Report to the supervising chapter officer on a regular basis and work toward achieving the overall goals of the chapter.
- Attend all chapter Board and membership meetings.
- Attend district, region, and state meetings and training sessions.
- Communicate regularly with members as to their needs and requests.
- Actively participate in the Degrees of Jaycees Program.
- Assist the chapter in attaining Blue Chip status.
- Assist with the affiliation of new chapters.
- Uphold the Bylaws of the national, state, and local organization. Advise the President of inappropriate activity and/or violations.
- Actively participate in the decision-making process of the chapter.

LOCAL PRESIDENT: PLEASE MAKE SURE TO COPY AND DISTRIBUTE THE APPROPRIATE SECTIONS OF THIS BOOK TO CHAPTER OFFICERS.

Chapter President Job Description

THE OFFICE OF PRESIDENT is a continuous position. It was there before the current President was elected and it will be there for his or her successor. Part of the role is to review activities of previous administrations and improve conditions and activities for the future of the chapter.

The President is the chief executive officer and the guiding force in the chapter. He or she presides over the Board of Directors and the membership and ensures that the Board acts in concert with the desires of the membership. He or she leads the chapter in a manner that will successfully blend community needs and the needs of members working together for mutual benefit.

The President is assisted by the chapter's Board of Directors. By nature of the position, the President will be perceived as being responsible for every detail, every action, every success, and even the failures. However, he or she is not alone! The Board will be of invaluable assistance.

The Board of Directors consists of the Chairman of the Board, Vice Presidents, Treasurer, Secretary, Legal Counsel, State Director, Directors, Chaplain, and Parliamentarian. Together, the President and the Board of Directors set policy for the chapter, taking their direction from the membership.

The President executes policy through the offi-

cers and committee chairpersons. He or she should define, in writing, the precise authority and responsibility each officer, director, and committee chairperson is given in order to ensure that they are fully trained for their jobs. Board members work with the President, but not for him or her. The President and members of the Board should be respectful of the other's authority and responsibility so that together they can focus on producing a healthy and successful chapter.

The President coordinates, inspires, and teaches. The Board is the servant of the membership. The role of a Chapter President is to serve as the chief executive officer of the local organization, handling administrative and personnel management and implementing the directives of the Board of Directors. As the leader of the local organization, he or she also serves as a member of the state organization Board of Directors, and the regional and district Boards, representing the views of the chapter.

The President should make a point to know the chapter Board of Directors personally and professionally, especially regarding their Jaycee goals and backgrounds. In the same way, the President should share his/her goals for the year and beyond with the Board.

The President should call together the full Board for the purpose of constructing a chapter plan. This will help Board members secure a clear understanding of what is expected of them including communication with the chapter officers for which they are responsible and the results of each activity in their area.

The President should work hand-in-hand with the Treasurer to ensure the chapter is fiscally sound. He or she should also work closely with the Secretary to ensure chapter records are in order and with the Vice Presidents to ensure that programming meets the needs of members, the chapter, and the community.

The President should preside over Board meetings, guiding the discussion on chapter business and the well-being of the membership. Membership meeting agendas are prepared at this time, so officers will know what is to happen and what will be expected of them.

The President should make use of the talents and abilities of the officers by delegating tasks and authority rather than trying to handle every detail personally. He or she should follow up as necessary, but it is vital that officers know when they are in charge, they are "in charge."

The President will represent the needs of the members of his or her local chapter by serving on district, regional, and state Boards. He or she should

understand all issues to be voted on.

The President should serve as the chief public relations representative for the chapter in the community and must behave professionally as befitting a chapter leader.

The President encourages involvement and leads by example, getting to know members, recruiting new members, and becoming personally involved in chapter projects. He or she should share information through newsletter articles, taking care to see that all members are adequately informed. He or she should tend to problems as they arise and ensure their resolution.

The President should lead the chapter in a manner that will fulfill its purpose to create an atmosphere in which the member can receive the benefits of membership, the image of the chapter is enhanced, and members of the community receive assistance through activities that show positive results.

*NOTE: PLEASE COPY AND DISTRIBUTE
THIS SECTION TO ALL
CHAPTER VICE PRESIDENTS.*

Vice President Responsibilities

The role of the various Chapter Vice Presidents is an essential one.

Vice Presidents serve as the team coaches and trainers for the Directors assigned to their areas. As team coaches, the Vice Presidents should develop friendships with their team members, get to know them, how they want to be involved, and listen to their input. The successful Vice President should be a good facilitator and mentor.

Vice Presidents assist the chapter by assessing the needs and interests of the members, reviewing prior year chapter plans for their areas, and developing (with the help of their teams) a plan of action for their areas in the coming year.

Vice Presidents should work with other members of the executive team (President, other Vice Presidents, and the Chairman of the Board) to ensure that sufficient resources are available such as manpower, funds, and time, to implement planned programs and achieve pre-set goals.

Vice Presidents should continually monitor and evaluate their programming, making changes when necessary.

Vice Presidents should prepare quarterly evaluations

and an annual evaluation of their progress, to be included as part of the programming books for their areas. These programming books will be submitted for judging. In addition, Vice Presidents must monitor their budgets to ensure that projects are in line with established funding.

Vice Presidents should continually solicit feedback from members regarding the members' needs and interests. This will not always be done in the form of a formal survey. Make a new Jaycee friend every day!

Vice Presidents are responsible for managing the work flow in their areas. As the plan is completed, project responsibilities should be divided among the Directors. Vice Presidents should stay in close contact with the Directors, assisting them with the recruitment and training of chairpeople whenever necessary.

Vice Presidents should be aware of project developments, providing guidance over the rough spots. Many times the success of a project will depend upon the ability of the Vice President to coach and motivate, know when to step in and lend a hand, or give a pep talk. They should follow up to ensure that Directors are on target without becoming overworked or uninterested.

Vice Presidents should keep the President informed of happenings in their areas. This includes the progress of projects, problems, and successes; the complete "goings on."

Vice Presidents should communicate the schedule of events and other pertinent issues at Board meetings and general membership meetings. These should be outlined on the agenda given to the President the week prior to the meeting.

Working with Directors

Vice Presidents should get to know their assigned Directors by learning about:

- Their interests, hobbies, etc.
- Their goals for the year.
- Their reasons for serving.
- Their personal goals.
- Their strengths/weaknesses.

Vice Presidents should train their assigned Directors concerning:

- The VP's goals and aspirations for the year.
- What their jobs are and how to do them.
- Where to find the resources they need in order to develop their weaknesses into strengths.
- The corporate development of goals, priorities, and assignments.

Vice Presidents should maintain constant communication with the team by:

- Holding team meetings.
- Touching base by phone weekly.
- Writing down goals, expectations, and responsibilities — each team member should be given a copy of others' goals and job descriptions.

Vice Presidents should hold their team members accountable for mutually agreed upon responsibilities by:

- Avoiding the urge to do their jobs for them.
- Always expecting the best.
- Empowering them to do the job.

Vice Presidents should maintain and reinforce the lines of communication in the chapter with:

- External organizations/individuals.
- The Chapter President.
- Other Vice Presidents.
- Directors.
- Chairpersons/general members.

Vice Presidents should foster communication up and down the ladder by:

- Working to never circumvent the line.
- Informing the President of breaches of communication protocol.

Vice Presidents should mentor the team to build future leaders by:

- Keeping a positive attitude and looking for good in others.
- Involving the team in what is being done.
- Praising strong efforts and jobs well done and saying, "Thank You!"
- Thinking of each team member as the next VP, President, etc.
- Providing constructive criticism when it can be well received.

Vice President Timeline

GETTING STARTED

Vice Presidents will find that the first two months are busy times for all Board members. They should remember that time spent NOW guarantees rewards in future months as the Vice President and the other members of the team begin to produce results, and goals of the programming area are realized.

Following is a list of things to be done in the first two months that will help Vice Presidents and their teams prepare for a successful year:

Review last year's chapter plan and the evaluations for the area. If the chapter submits programming books, it is likely that each Vice President will start the

year without those books. So, the prior year's VP should provide the following to their successor:

- A copy of the previous year's chapter plan
- A copy of each of four quarterly evaluations
- A copy of the annual evaluation
- A copy of the final year-end financial report (budget and actual) — these may be obtained from the Treasurer or President
- A copy of CPGs for the first- and second-quarter projects

Copies of these items should be distributed to the Directors, especially the plan and annual evaluation. These should be sent out in advance of the first team meeting. (Do not distribute the CPG copies at this time — addressed below.)

Don't wait to conduct a team meeting. The Vice President would be well-advised to schedule a team meeting as early as possible, so that everyone has a clear understanding of the area's purpose. The Vice President must determine early in his or her year where the Directors' interests lie, how each Director wants to contribute, and the goals each Director would like to see accomplished.

The Vice President should make an effort to learn why they became Directors. This is **IMPORTANT!** The Vice President won't accomplish much if the Directors aren't **INVOLVED** and **EMPOWERED**.

Complete the assigned area's chapter plan for the year as a team. Schedule and conduct team chapter planning meetings, which should include:

- Directors, the Vice President, and the President. Meetings should be structured to meet the needs of each individual team.
- Identification of the needs of the chapter as defined by the community and member survey, as they pertain to the assigned programming area, the strengths and weaknesses of the chapter, and goals the team wishes to accomplish. The Vice President should go over the budget and the calendar of events with the team.
- Time after the set of meetings is completed to type the plan in the appropriate format.
- Assignment of a portfolio of projects for each Director at the final chapter plan team meeting to ensure that the workload is both accommodating and balanced. Especially note that:

1. If a Director has a known time frame on his or her real job with excessive overtime, that Director should not be given a project to manage that falls within that time frame.

2. NO Director should have more than two projects going in any given month. (Ongoing projects may be an exception depending on the Director.) The CPG copies should be distributed to the appropriate Directors at this time.

- Determination by the President of the deadline for completion of the **DRAFT** of that area's chapter plan. Directors should be fully aware of this deadline. When the draft is due, the draft calendar and budget are also due.

- Determination by the President of the deadline for the **FINAL** submission of that area's chapter plan. The Board of Directors should approve the entire chapter plan (including calendar and budget) as an item of business at a regularly scheduled Board meeting. Each person on the Board should receive a copy of the entire plan.

REMEMBER: Directors should be fully involved in goal setting. This is an important tool in the establishment of responsibility and ownership.

Include the President in chapter planning meetings. The President's overall responsibility is to manage the chapter plan and the integration of each Area of Opportunity all year long.

The President should be informed of progress. If help is needed, **ASK!**

MONTHLY

Many hours have been spent planning and strategizing. Now is the time to implement all those plans. Here are a few items that need to be done on a monthly basis to keep members informed of events and, most importantly, to help the programming team stay focused and on target.

The week before the monthly membership meeting, the Vice Presidents should:

- Contact all assigned Directors and talk with them about the projects they're managing for the current and next month.
- Offer assistance if the Director is having difficulty lining up chairpeople.
- Determine whether assigned chairpeople will be at the meeting. If so, have they talked about how to "sell" the project to the membership? If not, the Director should be prepared to promote the project.
- Ask about the date, time, and location of the project. Vice Presidents may have to help their Directors find chairpeople for projects especially in the first and second quarters.
- Organize the project information into an agenda. Each project should be listed with chairperson(s), phone number, the date, time, and location. List projects in categories:
 - Current events (any project occurring between this meeting and the next)
 - Upcoming events (any project occurring after the next meeting)
 - Ongoing events (any project that occurs on a

monthly basis)

- FYI (events that may be of interest to the membership, but aren't chapter projects)
- Turn agenda items in to the President one or two days prior to the meeting.

For the membership meeting, the Vice Presidents should: Contact all team members prior to the start of the meeting, and ensure that they understand that they, or their chairperson, will be asked to speak about their projects.

Post a sign-up sheet in the room for every project on the agenda.

The week before each Board meeting, the Vice Presidents should:

- Contact the Directors again to follow up on projects. The Vice President should ask about changes to upcoming projects, issues to be dealt with, and any budget changes that need to be approved.

- Ask the Directors to contact their chairpeople and help them write articles to promote upcoming events or report the results of events that have occurred in the prior month. (Writing project articles for the chapter newsletter is the job of the chairpersons, but they frequently need to be reminded to do so.)

- Ask whether Directors have helped their chairpeople finish CPGs for completed events or start CPGs for upcoming events.

- Prepare the Board meeting agenda. This is basically the same as the membership meeting agenda, except that projects are "moved" up. In other words, current events are now those projects occurring between this Board meeting and the next. The Board meeting agenda includes "discussion items."

- "Discussion items" are those items that need to be discussed with the Board of Directors regarding the management of the assigned area. For example, increases in the budget or the approval of a project which wasn't in the original chapter plan need to be brought before the Board. Typically, the "discussion items" are what the Board meetings are about. The rest of the agenda is intended to clarify project information and no time is spent discussing the projects listed under current and upcoming events.

Base the agenda on the Calendar of Events. The Board meeting is where Vice Presidents should be "getting ahead of the game" and implementing the plan for the future.

Write the newsletter article (the timing depends on the newsletter deadline). Each VP and the President should write newsletter articles each month. The content of the article should include the happenings in the assigned area. Additionally, chairpeople should be submitting articles about their projects.

Optional but Recommended:

- Conduct monthly team meetings with the Directors, which will help them stay organized. It also helps for the whole team to brainstorm about problems. This creates a camaraderie and an enthusiasm that the membership can't help but catch. It also gives the Vice President an opportunity to constantly evaluate the workload and redistribute it if necessary.

- Instruct the Directors to collect completed CPGs from their chairpeople prior to the Board meeting following the running of their project. This will decrease the pressure on Directors and chairpeople at the end of each quarter when it is time for quarterly evaluations.

QUARTER END MONTHS

These are special months. Vice Presidents should spend time writing the chapter plan quarterly evaluation and putting together the books for submission (if the chapter does books). The first quarter will take a little longer than subsequent quarters since the evaluation will have to be formatted for the first time. **EVEN IF THE CHAPTER DOES NOT SUBMIT BOOKS, A QUARTERLY EVALUATION SHOULD STILL BE WRITTEN!** The quarterly evaluation will indicate whether the area's goals are on target.

Before actually writing the evaluation, Vice Presidents should read through all the project CPGs and go over the sign-up sheets for the projects. By doing this, project impact can be determined and, ultimately, the impact of that area of the chapter. Once impact has been determined, look at the original goals to see if the team is on track to meet those goals.

Once the quarterly evaluation is completed, Vice Presidents should meet with the Directors to discuss how they feel the quarter went. Should goals be revised? What projects should be added or deleted? Does the budget need to be adjusted? Remember, part of the reason for writing quarterly evaluations is to redirect efforts by identifying problem areas and planning solutions. The entire Board should also meet to discuss the entire chapter plan and approve revisions as necessary.

YEAR-END

These are critically important months. Part of the success of the year can be measured by the way the transition period has been set up for the next team. Writing a 15-month chapter plan is an opportunity to deliver an easy transition in the first quarter.

Vice Presidents should:

- Make sure the assigned area has project run dates for the first quarter. This will allow the next team to concentrate on building a good plan while learning the

skills required to complete a successful year.

- Recruit chairpeople for first-quarter projects. Schedule first committee meetings, if applicable.
- Provide the new VP with copies of the first- and second-quarter CPGs, so they have an information base from which to run projects.
- Provide the new VP with copies of the area's chapter plan, quarterly evaluations, and an annual evaluation.
- Meet with the new VP to turn over information, share ideas, and help him or her get started on the right foot!

Community VP

Suggested Area of Opportunity Responsibilities: Community Service, Community Fundraising, Governmental Involvement, State and National Junior Chamber Involvement, Membership Recruitment (recruitment, extensions, internal chapter assistance).

- Develop and conduct a community survey to determine the needs or problems in the community.
- Develop a plan of action for the Area based on the results of the survey.
- Assist the Treasurer in the development and maintenance of the community portion of the chapter budget.
- Supervise and train assigned Directors.
- Oversee the selection and training of project chairpersons by Directors.
- Write and submit monthly articles for chapter publication.
- Periodically evaluate assigned area plan and report progress to the chapter's Board of Directors.
- Provide a written evaluation of the area at year-end.
- Serve as or oversee a liaison between the chapter and the community. (i.e.: city government, Chamber of Commerce, other civic organizations, school board, etc.)
- Utilize community projects for the recruitment of new members into the chapter.

The Community Vice President is the leader in "community advancement." He or she directs efforts to identify community needs; selects (with the Board) the ones the chapter can effect; and determines the best way to achieve results. First, survey the community to determine those items needing to be addressed. After discussing these with the chapter Board, complete the Community Area of Opportunity portion of the chapter plan, working hand-in-hand with the Treasurer to ensure budgetary items are covered.

The Community Vice President works with the Individual Development Vice President to include community development projects in the chapter's member activation program. He or she also works with the

Individual Development Vice President to ensure members are prepared for the community development projects they have selected. The Community Vice President directs recruitment (internal and external) activities of the chapter. Get to know members and their needs, and constantly promote the chapter and member's image in the community.

Individual Development VP

Suggested Area of Opportunity Responsibilities: Life Improvement, Chapter Management (officer and member training and communications), Member Services (orientation and activation).

- Develop and conduct a member survey to determine the strengths and weaknesses of the chapter and the needs of the members.
- Develop a plan of action for the Area based on the results of the survey.
- Assist the Treasurer in the development and maintenance of the individual development portion of the chapter budget.
- Supervise and train assigned Directors.
- Oversee the selection and training of project chairpersons by Directors.
- Write and submit monthly articles for chapter publication.
- Periodically evaluate Area plan and report progress to the chapter's Board of Directors.
- Provide a written evaluation of assigned Area at year-end.
- Oversee the selection of guest speakers to meet members' personal development needs.
- Utilize individual development projects to recruit new members into the chapter.
- Promote participation in the individual competition programs.

The IDVP is the leader in "member advancement." It is through the efforts of the Individual Development Vice President that the requests and needs of the members are addressed. First, survey the membership to determine its needs. After discussing these with the chapter Board, complete the Individual Area of Opportunity portion of the chapter plan, working hand-in-hand with the Treasurer to ensure budgetary items are covered.

Work with the Community Vice President to make sure members are prepared to conduct community-focused projects. Get to know members and their needs, and constantly promote the chapter and member's image in the community. The Individual Development Vice President should ensure that members are trained in

such a manner to conduct effective programming in all areas. The IDVP also collaborates with the Business, International, Management, and Community Vice Presidents to include their projects and programs in the promotion of member activation.

Management VP

Suggested Area of Opportunity Responsibilities: Chapter Management (planning and evaluation), Financial Management, Chapter Activities, and Public Relations.

- Develop and conduct a member survey to determine the strengths and weaknesses of the chapter and the needs of the members.
- Develop a plan of action for the Area based on the results of the survey.
- Assist the Treasurer with the development and maintenance of the chapter budget.
- Supervise and train assigned Directors.
- Oversee the selection and training of project chairpeople by Directors.
- Oversee the publication of a monthly chapter publication.
- Write and submit monthly articles for chapter publication.
- Oversee the chapter's public relations efforts.
- Periodically evaluate the Area plan and report progress to the chapter's board.
- Provide a written evaluation of Area at year-end.
- Oversee all ways and means projects.
- Oversee recognition program for the chapter.
- Ensure Blue Chip submissions are done on a timely basis.

The Management Development Vice President keeps up with what's going on and who's doing it. Why? Because each member must be involved in the Junior Chamber to get any benefit from it. Management Development is the area that tracks the "health" of the chapter by knowing about progress being made on the accomplishments of chapter goals.

Whole chapter health is recorded through the Blue Chip program. It is the MDVP who makes sure proper paperwork is submitted for these programs. The Management Vice President provides social and recognition programs to the members to ensure continued interest in the chapter by the members.

Business VP

Suggested Area of Opportunity Responsibilities: Business Opportunities, Leadership Development.

- Develop and conduct a member/community survey to determine the strengths and weaknesses of the

chapter/community and the needs of the members/community.

- Develop a plan of action for the Area based on the results of the survey.
- Assist the Treasurer in the development and maintenance of the Business portion of the chapter budget.
- Supervise and train assigned Directors.
- Write and submit monthly articles for chapter publication.
- Periodically evaluate Area plan and report progress to the chapter's Board of Directors.
- Provide a written evaluation of assigned Area at year-end.
- Utilize Business Area of Opportunity projects to recruit new members into the chapter.
- Promote participation in the interview competitions (Armbruster, Brownfield) and Debate competition programs. The Business Area of Opportunity Vice President responds to the needs of the membership and the community for business-oriented programs. First survey the membership and community to determine their needs. After discussing these with the chapter Board, complete the Business portion of the chapter plan, working hand-in-hand with the Treasurer to ensure budgetary items are covered.

The Business Area of Opportunity Vice President works with the Individual Area of Opportunity Vice President to include Business programs in the chapter's member activation program. Also work with the Community Area of Opportunity Vice President to make sure that members are prepared to conduct business programming for the community. The Business Area of Opportunity Vice President also ensures there is enough manpower available to run Business programming.

International VP

Suggested Area of Opportunity Responsibilities: International Involvement.

- Develop and conduct a member survey to determine the strengths and weaknesses of the chapter and the needs of the members.
- Develop a plan of action for the Area based on the results of the survey.
- Assist the Treasurer in the development and maintenance of the International portion of the chapter budget
- Supervise and train assigned Directors.
- Write and submit monthly articles for chapter publication.
- Periodically evaluate Area plan and report progress to

the chapter's Board of Directors.

- Provide a written evaluation of assigned Area at year-end.
- Utilize International Area of Opportunity projects to recruit new members into the chapter.

The International Area of Opportunity Vice President is the leader in global awareness in the chapter. It is through the efforts of this Vice President and his or her team, that programs exposing members to different countries and cultures are developed for the chapter. And provide educational opportunities for the members.

First survey the membership to determine their needs. After discussing these with the chapter Board, complete the International portion of the chapter plan, working hand-in-hand with the Treasurer to ensure budgetary items are covered.

The International Area of Opportunity Vice President works with the Individual Area of Opportunity Vice President to include International programs in the chapter's member activation program. The Community Area of Opportunity Vice President also ensures there is enough manpower available to run International programming.

State Director Responsibilities

The State Director is the link between the chapter and the state, national, and international organizations. Along with the Chapter President, he or she serves on the state organization's Board of Directors and Regional and District Boards, representing the views of the chapter and its members. Serving in the capacity of liaison between the state and local organizations, the State Director accurately communicates information about the state meetings and issues of importance to the members of the chapter. He or she also serves as a voice for the chapter's opinions on district, regional, and state levels.

The State Director works with the members, evaluating attitudes and trends. He or she knows when members are happy and when they aren't. These findings are reported to the Board, with suggestions for addressing these needs. The State Director also leads by example, working on projects, assisting new members, and recruiting prospective members.

The State Director also plans visitations to other chapters. Visitations can be beneficial to both the chapter visiting and the chapter being visited. Together with

the Board of Directors, the State Director selects chapters to visit, contacts those chapters, and arranges for transportation. Through work on various levels, the State Director knows what's going on around the state and therefore can identify chapters for visitations.

Through this network, the State Director is also aware of communities that don't have chapters. It is through his or her efforts that the chapter completes extensions. This involves not only recruiting, but staying in close touch with the new chapter to ensure it knows everything it must do to become successful.

The State Director will:

- Serve as a member of the state Board of Directors along with Chapter President.
- Prepare and present reports to the Board of Directors and the general membership on district, regional, state, national, and international meetings.
- Submit articles to chapter publication on activities of district, region, state, national, and international meetings.
- Develop and coordinate the chapter visitation program.
- Promote attendance at district, region, state, national, and international activities.
- Plan and coordinate the efforts of the chapter on extending new Jaycee chapters.
- Supervise book submissions to state, national, and international organizations.

Treasurer Responsibilities

The Treasurer ensures that all financial records are kept for the chapter. These financial records include:

- Dues billings
- Tax information
- Bank records
- Correspondence with legal counsel

The Treasurer is responsible for filing appropriate paperwork in a timely manner, according to federal, state, and local laws and ensures the fiscal stability of the chapter by reviewing the bank statement and monies paid out monthly.

The Treasurer communicates regularly with the Chapter President, and also reports to the Board and membership on the financial status. In this capacity, the Treasurer works with the Vice Presidents to ensure that they are provided with the information they need for

various projects and programs. When funding is unavailable, the Treasurer recommends alternative ideas such as in-kind donations.

Working with the President and Membership Vice President, the Treasurer oversees the dues billing process for the chapter. As a Board member, he or she provides information to fellow Board members regarding membership attitude and involvement.

The Treasurer also guides and directs plans for the future of the local organization by advising the Board of financial implications of such plans. he or she leads by example, working on various projects, getting to know current members, and recruiting new members.

The Treasurer will:

- Reconcile monthly bank statements.
- Provide a financial statement for each Board meeting.
- Coordinate the chapter dues billing system.
- Pay all chapter bills within a reasonable time frame (30 days).
- Deposit all income regularly and keep detailed records of deposits.
- Prepare an annual budget; coordinate with each chapter officer responsible for any income or expense.
- Supervise the activities of the chapter finance committee.
- Coordinate an annual audit of the corporation.
- Provide for necessary insurance information for the chapter and see that payments are made on time.
- File all necessary forms and pay related fees in conjunction with maintaining corporate status.
- File state and federal tax forms and pay related fees.

Secretary Responsibilities

The Secretary takes care of all written documents of chapter activities, keeping them in an accurate manner, including meeting minutes, agendas, newsletters, and correspondence.

The Secretary works with all Board members in an effort to provide important chapter information to members, especially via the newsletter. Because of this unique position, the Secretary is able to keep his or her finger on the pulse of the chapter.

Working with the Treasurer, the Secretary also main-

tains accurate chapter records, including the membership rosters. The Secretary leads by example, by communicating with members, working on selected projects, and by being involved in the recruiting process.

The Secretary will:

- Keep accurate records of the proceedings of all chapter meetings.
- Prepare minutes for approval at each scheduled chapter meeting.
- Count and record votes at chapter Board and membership meetings.
- Assist the President in preparing the agenda for all chapter meetings.
- Provide current membership rosters upon request.
- Maintain calendar of events.
- Handle all outgoing chapter correspondence.
- Coordinate publication of chapter newsletter.

Legal Counsel Responsibilities

The Legal Counsel must ensure that all legal documents necessary for the chapter are completed and filed by appropriate deadlines, according to federal, state, and local laws. These include:

- Reports to the IRS
- Chapter Employer ID number
- Reports required by the state Attorney General, etc.
- Complying with USJC trademark guidelines

The State Legal Counsel will also guide and direct plans for the future of the local organization by giving advice on the legal aspects of such plans.

As with other Board members, the Legal Counsel should know the chapter's plan and goals. He or she should provide information to the other Board members on activities of the members and their attitudes and provide input to the Board on the direction the chapter is taking.

The Legal Counsel should work with other Board members to ensure that the chapter is providing the opportunities necessary for the members to get the most they can from their work in the chapter. He or she should lead by example, working on projects, working with current members, and recruiting new members.

The Legal Counsel will:

- Review all CPGs for potential liability.

- Review all contracts for the chapter prior to the President signing them.
- Prepare all reports for the state, the IRS, etc.
- Review chapter's insurance needs annually.

Employer Identification Number

When a chapter asks to open a checking account, the bank will require an Employer Identification Number (EIN) from the IRS. The chapter will need an EIN when requesting inclusion in The U.S. Junior Chamber Group Exemption number and when filing federal or state tax forms.

An organization needs an EIN even if it does not have employees. An Application for Employer Identification Number (SS-4 Form) can be obtained from the Internal Revenue Service. You can complete and print the form free of charge, by visiting the IRS web site at: http://www.irs.ustreas.gov/prod/forms_pub/formpub.html The SS-4 Form includes instructions for obtaining the EIN by phone from the regional IRS office.

Chapter Incorporation

Incorporation provides personal protection. If a project should be attended by the public and someone is injured, insurance may provide some protection, but an exclusion in the policy could deny coverage. A similar situation could arise when a group of Jaycees travel together in a vehicle that is involved in an accident, causing injury to others.

If the chapter is incorporated, the liability will most likely stop at the limit of corporate assets. But if it is not incorporated, every member could be held liable for the entire amount of liability.

Forming a corporation for a Junior Chamber chapter is simple, and the exclusion of personal liability is only one of the benefits. Find out if the chapter is incorporated as soon as possible. A record of incorporation is in the secretary of state's office in the state capital.

If the chapter's official name is "Jaycees," it should be amended to include "Also known as Junior Chamber." The chapter has license to use both names in the incorporation papers. See the chapter's attorney to draft articles of incorporation.

Internal Revenue Responsibilities

There is an important distinction between a non-profit and tax-exempt corporation. Generally, any

income received by an individual or organization, whether incorporated or not, is taxable under the Internal Revenue Code. An exemption from this law is available to certain qualifying organizations.

Many Junior Chamber chapters, because of their status as organizations whose primary interest is social welfare, have been eligible for exemption from income tax under Section 501(c)(4) of the Internal Revenue Code. This exempt status is not granted automatically.

The U.S. Junior Chamber does have a group exemption. When requesting to be added to the list, use the Group Exemption Form in the forms section of the web site. Include the chapter's legal name and Federal Employer's I.D. number, along with street and mailing addresses to The U.S. Junior Chamber, Attn: Director of Finance.

If chapter officers are uncertain about the chapter's tax reporting position or responsibility, they should take no action on their own. They should check with the chapter's Legal Counsel or certified public accountant (CPA) for an explanation of the status and the steps to take to qualify with state and federal taxing authority.

Tax Reports

There should be no confusion about the responsibility of a Junior Chamber chapter to file tax reports. Even if the chapter is exempt from paying income tax, it is required to file IRS Form 990.

Failure to comply with city, state, or federal tax laws could result in legal action or monetary penalty. Additionally, if the chapter has unrelated business income such as royalties or advertising income, and if the annual gross receipts are more than \$25,000, it may be necessary to file an IRS Form 990T.

Because of the many factors involved, specific recommendations or instructions cannot be offered here. If there are any questions about the tax status of the chapter, an attorney or CPA should be contacted.

Public Relations Director Responsibilities

The Public Relations (PR) Director in the chapter is frequently an overlooked position. Having a PR Director can benefit a chapter in many ways including influencing others to join the chapter, informing the

community about the chapter's activities, increasing attendance at chapter events, and so on.

The PR Director position is a valuable addition to a chapter and as such, the individual assigned to this area should have no other responsibilities.

Specifically, the PR Director is responsible for the following:

- Assist the Management Development Vice President in writing the PR portion of the chapter plan.
- Work closely with each Vice President to promote all chapter projects.
- Promote chapter activities internally through the chapter newsletter and at chapter meetings.
- Promote chapter activities externally through press releases to all media outlets, including television, radio, and print.
- Work with state and national Junior Chamber organization to promote Junior Chamber programs.
- In absence of Chapter President, act as spokesperson for the chapter.
- Actively seek out potential new members and work to add them to the chapter roster.
- Lead by example by being visible in chapter activities.

For additional information on running the chapter's PR program, refer to the PR Guide in the Library Section of the web site.

Chaplain Responsibilities

The Chaplain coordinates the activities of a chapter with regards to spiritual development programming.

We know that it is impossible for our organization to program Jaycees into spiritual growth. As Emerson states, "God enters by a private door into every individual." The Jaycees' spiritual development concept is that rather than programming spiritual development, we are concentrating on a people-to-people exchange of attitudes and ideals. This exchange through involvement in Jaycee activities has and will continue to stimulate members to be aware of the importance of spiritual involvement in their lives.

Regardless of the leadership and guidance exerted by The United States Junior Chamber and the USJC Chaplain, a spiritual development program cannot be

effective if local officers and other members within a chapter do not receive a local Chaplain's guidance and assistance.

A local Chaplain will:

- Coordinate the efforts of others in spiritual development and help members put action into their belief "That faith in God gives meaning and purpose to human life."
- Conduct nondenominational religious activities within the chapter that educate and develop the members spiritually.
- Serve as member of the chapter's Board of Directors and regularly report spiritual development activities to the Board.
- Submit articles of a spiritual or motivational nature to the chapter newsletter on a regular basis.
- Work with chapter members to determine the needs and desires of the membership for spiritual development programming.

Much like Individual Development programs and projects, the imagination and desire of the individual members of the chapter will guide the creation of spiritual development programs and projects. The key to successful spiritual development programming is to keep these programs nondenominational in nature. Remember, Jaycee membership comes from many different religions and faiths.

The following are some ideas for spiritual development programming:

Share Your Faith — have individual members visit different community churches, temples, or synagogues to experience different faiths and religions.

Invocations/Benedictions — deliver nondenominational invocations and prayers at all chapter membership and Board meetings.

Spotlight the Clergy — hold a community gathering such as an ice cream social to honor the clergy in the community. Could be held in conjunction with the chapter's Distinguished Service Award program with recognition available for Most Outstanding Religious Leader in the community.

Prayer Breakfast — a simple breakfast with a short nondenominational program. The program can consist of special speakers from different religions and/or Junior Jaycees or other groups providing singing or dancing.

Newsletter Chaplain's Corner — provide inspirational nondenominational quotes, prayers, and/or stories in each chapter newsletter. Newsletter article should also mention illnesses, deaths, births, birthdays, etc., of Jaycee members and their families.

For additional information and project ideas, contact the Junior Chamber Products Department for "A Chaplain's Guide to Conducting Spiritual Development Projects." You can visit them at www.juniorchamber.org.

Local Director Responsibilities

The Local Director provides the necessary communication link to the assigned members. Local Directors call their assigned members at least twice a month, keeping them informed of chapter activities and receiving valuable feedback.

Local Directors should make "How's it going?" calls from time to time to learn what the members are feeling about issues of importance to the chapter and communicate these to their assigned Vice Presidents and fellow Board members.

Local Directors also recruit project chairpersons, working with them to make sure they know how to carry out their responsibilities. In this case, Local Directors work with other chapter officers to ensure chairperson's needs are addressed.

Local Directors will:

- Assist assigned Vice President in developing assigned Area of Opportunity plans.
- Communicate regularly with Vice President.
- Recruit and train project chairpersons in CPG process.
- Communicate regularly with project chairpersons.
- Report progress of assigned projects at Board of Directors meeting.

How to Recruit Chairpeople

A. Before a chairperson is selected.

1. Chairperson's Profile.

a. Develop project hierarchy to determine number of people. How many committee members will need to be supervised?

b. Loosely determine goals. What is to be accomplished with this project?

c. Determine amount of time chairperson should be a member of the chapter to run the project. Can a new member reasonably run the project?

d. Determine project experience necessary to successfully run project. Is a first-time chairperson okay, or is prior chairperson experience necessary?

e. From this "profile," select target group of members that could run project. Review chapter roster to target members that fit the criteria.

f. Recruit most appropriate chairperson.

Once the target profile of a chairperson is defined, the chapter roster should be reviewed for potential candidates who meet the chairperson's profile. Then SELL, SELL, SELL! If it is determined that the target chairperson already has the skills necessary to run the project and those skills can be presented to them, they can easily be sold on chairing the project!

B. After a chairperson is selected.

1. What to do before the CPG is submitted.

a. Meet with chairperson to do CPG training. Thoroughly explain the CPG process.

b. Require a rough draft from chairperson at least one week before CPG is due to VP.

c. Review rough draft with VP.

d. Return rough draft to chairperson with necessary revisions. Meet with the chairperson to go over any necessary changes to the plan.

e. Submit final copy to VP for submission to Board of Directors.

f. Advise chairperson of necessary changes before Board of Directors meeting.

g. Meet with chairperson to go over potential objections to project and train him or her on how to present CPG to Board of Directors.

2. What to do after the CPG is submitted.

a. Follow Director and VP calendars to make sure projects are following the outlined steps.

b. Attend day of event.

c. Communicate with chairperson as necessary.

d. Aid the chairperson as necessary, but do not accept the responsibility.

3. Submitting final CPG.

a. Meet with chairperson to train them in the final CPG process.

- b. Require a rough draft from chairperson at least one week before CPG is due to VP.
- c. Review rough draft with VP.
- d. Return rough draft to chairperson with necessary revisions.
- e. Submit final copy to VP for submission to Board of Directors.
- f. Advise chairperson of necessary changes before Board of Directors meeting.
- g. Meet with chairperson to train him or her on how to present CPG to Board of Directors.

Dos and Don'ts of Training Chairpeople

DO:

- Choose chairpeople carefully and well in advance (use chairperson's profile).
- Use membership resources to secure chairpeople.
- Train chairpeople thoroughly and in person (use CPG process).
- Encourage chairpeople to attend chairperson's training sessions.
- Require a rough draft of CPGs and review in advance of submission to VP and Board of Directors.
- Attend chairperson's project.
- Give plenty of notice for quarterly updates and train chairpeople on how to do them.
- Train chairpeople to present at Board meetings.
- Train chairpeople to delegate to their committee.
- Train chairpeople on how to write final CPG.
- Write thank-you notes on regular basis.

DON'T:

- Throw an old CPG at a chairperson and expect them to write a CPG on their own.
- Recruit chairpeople at general membership meetings or M-nights.
- Let chairpeople "hang" at Board meetings by not informing them of potential conflicts with their projects.
- Inform chairpeople of important dates at the last minute.
- Twist arms to get members to chair projects. (Sell them on benefits!)
- Fly by the seat of your pants — you won't be successful!