

SOBA America
Officers Job Descriptions

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Title: **President**

Date: 1/2013

By Laws:

PRESIDENT: The President shall preside over all meetings, be responsible for the internal and external functions of the association and will enforce the by-laws. Shall appoint officers in the event of their absence, incapacitation or impeachment.

Job Duties and responsibilities (Standing rules):

1. Lead SOBA America toward specific goals chosen by its members. The goals must be consistent with the purposes of SOBA America
2. All written materials produced by SOBA America (e.g., newsletters, fliers, website postings, or notices) are to be cleared with the SOBA America president before publishing and is responsible for the accuracy of that information.
3. Prior to taking office, he shall hold brainstorming session(s) with other office holders to establish goals
4. Evaluate current committee members and decide which are needed, and strive for a balance of experience and new members.
5. Appoint an auditor or delegate a member to audit the association finances twice a year at mid year and at end of year.
6. Appoint a committee to review and/or revise the bylaws.
7. Appoint a committee for fund raising.
8. Prepare a master calendar that includes association meetings and fundraising activities.
9. Develop and present a budget for the association. Work with treasurer to develop the budget
10. Authorize the purchase of Service Awards to be presented at the convention and Gifts to be distributed to paid members at convention.
11. Prepare the agenda for meetings ahead of time, and provide copies to the Secretary General.
12. Encourage cooperation and sharing of materials between outgoing and incoming NEC members.
13. Work collaboratively with other similar association with same values and interest.

Knowledge and Skills:

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Title: **Vice President**

Date: 1/2013

By Laws:

VICE PRESIDENT: The Vice President shall assume the duties of the President in the event of his absence, incapacitation or impeachment and shall also assist him in lieu thereof

Job Duties and responsibilities (Standing rules):

1. Perform the duties of the president in the absence or disability of that officer to act.
2. Work with the President is making sure that the association's goals are on track to be met.
3. In the absence of the President, call the meeting to order and preside until the election of a chairman pro tem, unless the bylaws specify otherwise.
4. Provide assistance with recommending committee members.
5. Assist the President with the preparation of the agenda for meetings ahead of time, and provide copies to the Secretary General.
6. Coordinate with treasurer-elect to have the signature cards for bank accounts updated with new officers and submitted to the bank at the beginning of the new term.
7. Order Service Awards and Gifts to be distributed to paid members at convention the presentation.
8. Maintain and revise the job descriptions of the association and make recommendation for changes or addition.

Knowledge and Skills:

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Title: **Secretary General**

Date: 1/2013

By Laws:

SECRETARY GENERAL: The Secretary General shall be the recorder of all executive and general assembly meetings and take care of all correspondences unless otherwise specified in the by-laws. The Secretary General shall supervise the functions of the Webmaster.

Job Duties and responsibilities (Standing rules):

1. Maintain an accurate list of SOBA America members.
2. Obtain previous SOBA America and NEC meeting minutes.
3. Obtain the official master set of the bylaws of SOBA America
4. Keep an accurate, concise, permanent record of the proceedings of all meetings of the association and of the executives (NEC). Minutes contain a record of action taken by the group, with action recorded in the order it took place. Personal opinion and discussion are not included.
5. Prepare a list of unfinished business items for the president and assist with preparation of the agenda, if requested.
6. Have on hand for reference at each meeting a copy of the bylaws and standing rules, copies of agendas, minutes of previous meetings, list of all committees, and an up-to-date list of all members.
7. Read the minutes of any previous meeting, when called upon to do so.
8. Minutes are not to be posted on any website; however, a summary of association minutes is appropriate.
9. Make all corrections to the official minutes. Corrections to the minutes are made immediately following the reading of the minutes, during the time specified on the agenda for minutes, or at any subsequent meeting when errors are discovered. The current minutes shall reflect that a correction was made.
10. Enter all amendments to the bylaws in the minutes, at the meeting at which the vote is taken.
11. In the absence of the president and vice president, call the meeting to order and preside until the election of the President, unless the bylaws specify otherwise.
12. Be responsible for all records, documents and papers (except those assigned to others).
13. Copy of any resolutions adopted;

14. Record of results of any election and votes cast;
15. Time of adjournment
16. Supervise the activities of the webmaster.

Knowledge and Skills:

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Title: **Treasurer**

Date: 1/2013

By Laws:

TREASURER: The Treasurer shall be the keeper of all the funds of the Association, maintain duplicates of all financial transactions and be responsible for all banking activities. He shall present an up-to-date account of the Association funds at all general assemble meetings in collaboration with the Financial Secretary.

Job Duties and responsibilities (Standing rules):

1. Obtain hard copy of financial records and materials such as supplies, checkbook, tax records, and any bank records (Credit Cards etc.). If the previous treasurer utilized a computer program to maintain the financial records, identify how those files have been saved, how the computer files will be transferred, and if a computer program will continue to be used.
2. File new signature cards for SOBA America account (s) at bank approved by NEC. Require two signatures on all checks.
Authorized signers SHALL NOT be related by blood or marriage or reside in the same household and shall only be those officers as authorized in the bylaws.
3. Develop a carefully considered budget as a financial guide for the year.
4. Present the proposed budget to the executive board for suggestions.
Have NEC recommend adoption of the budget to the association at the first regular meeting of the year. The association may amend the budget before voting on adoption.
5. Issue a receipt for all monies received and deposit all monies promptly in the SOBA America bank account.
6. Pay by check all bills duly authorized. **The budget is not an authorization to pay bills.** Bills must be presented to the association or to the Financial Secretary for payment.
 - a. Disburse funds to the chapter hosting convention as instructed by the by laws No later than 2 months prior to the convention.
7. Represent SOBA America during Gala Nights at conventions.
 - a. Collect all gate fees, proceeds from drinks using template (**financial committee will create one**).
 - b. If none is available, create a sheet with the association name and date. Enter into a separate line the money being received, name and signature of person giving the money, and signature of the treasurer. At the end of convention, a copy of this sheet must be given to the hosting chapter and copy kept by the treasurer.

8. Keep in ink (no erasures or whiteout) an accurate and detailed account in the permanent treasurer's book (ledger) of all monies received and disbursed; the number of members; and the amount of dues collected from members.
9. Keep treasurer's book (ledger) and checkbook up to date, with current balance shown in checkbook at all times.
 - a. – Reconcile bank statement immediately upon receipt.
 - b. – It is strongly recommended for the protection of SOBA America, that the auditor or another elected officer who does not sign SOBA America checks also reconcile monthly bank statements in addition to the treasurer.
 - c. – Watch for checks that do not clear within a reasonable time and investigate.
10. File tax return – IRS Form 990.

Knowledge and Skills:

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Title: **Financial Secretary**

Date: 1/2013

By Laws:

FINANCIAL SECRETARY: The Financial Secretary shall work in collaboration with the Treasurer to keep an up-to-date record of all financial transactions and be ready to present them at the General Meetings. His records shall be consistent with that of the Treasurer.

Job Duties and responsibilities (Standing rules):

1. Prepare and sign all authorizations for payment if authorized by NEC or the association.
2. Give the treasurer itemized bills, sales slips, and invoices for payment by check.
3. Attend all events where money may need to be counted.
4. Make sure that at least two people count the money together. This may include the event chairman and treasurer or financial secretary if possible.
5. Keep a record of all funds counted using (Template to be developed)
6. Ensure that all persons counting the money sign (the template named above)
7. Submit written reports for each bank account at meetings of the executives (NEC) and SOBA America. Following the sample prepared by the Financial Committee, include in each report:
 - a. – the total balance on hand at the beginning of the period covered by the report;
 - b. – receipts and disbursements detailed as to origin and recipient;
 - c. – the total balance on hand and the ending of the period as of the date of report;
 - d. – signature of person preparing report and date prepared.
8. Prepare an Annual Financial Report of all monies received during the past fiscal year. The dates of the fiscal year will be found in the bylaws.
 - a. –Must contain IRS Employment Identification Number (EIN).
 - b. – balance on hand at the beginning of the fiscal year;
 - c. – receipts and disbursements of funds;
 - d. – total balance on hand at the ending of the fiscal year; and
 - e. – signature of person preparing report and date prepared.
9. Make all financial records available for audit at the times specified in the Bylaws (we do not have this yet).
10. Distribute report to the president, secretary General and all financial officers. Keep a copy for the financial.

11. Books must be audited mid-year and fiscal year end and at any time a financial officer or check signer resigns or is terminated, before the new officer assumes the duties, and whenever deemed necessary.

Knowledge and Skills:

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Title: **Organizing Secretary**

Date: 1/2013

By Laws:

ORGANIZING SECRETARY: The Organizing Secretary shall be responsible for social and cultural affairs of the Association and shall work closely with the General Secretary.

Job Duties and responsibilities (Standing rules):

1. Become familiar with information and materials for Chapter Presidents, which should include: Name, address, telephone number and e-mail addresses
2. Make reservations for meeting place and hotel for the convention well in advance. (Some places may require dates for the year reserved at one time.)
3. 6 months before convention, attend host chapter planning meeting via conference calls or in person if possible.
Include in discussion such items as;
 - a. Lodging reservation, registration, meeting room set-up, local chapter contacts, decorations, refreshments, etc.
 - b. Physical setting: number of chairs for audience, lectern, microphone, water and glasses, table and chairs for presiding officer and others, seating for program participants, audio visual presentation equipment, etc.
 - c. Secure all local licenses for activity hall and alcohol consumption during the event. Have it available in the case that it is requested by authority.
 - d. Send out communique about lodging to SOBANS and invite them to reserve their rooms.
4. Report at each NEC meeting on hospitality plans for forthcoming convention.
5. On the day of the convention or planned activity,
 - a. Arrive early to be sure the door is unlocked, lights are turned on, temperature is comfortable and the room ready.
 - b. Assign a SOBAN to help with registration. The financial secretary or treasurer will collect dues and registration fees.
 - c. Alert president to any special guests who should be introduced.
 - d. Be available to assist president, if the need arises.
 - e. Have a room count ready, if needed
6. During the meeting
 - a. Serve as a messenger for the president and/or officers to maintain order

during the meeting.

b. Be available to assist presiding officer or speaker with distributing materials, as needed.

c.

Knowledge and Skills:

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Title: **Publicity Secretary**

Date: 1/2013

By Laws:

PUBLICITY SECRETARY: The Publicity Secretary shall be responsible for the advertisement and publicity of the association events and campaign. He shall be responsible in collaboration with the Organizing Secretary for informing SOBANS and the public if necessary of upcoming event(s).

Job Duties and responsibilities (Standing rules):

1. Create and maintain SOBA America organizational chart
2. Announce, promote and publicize annual convention and important activities that SOBANS are to be involved.
 - a. Conventions shall be publicized at least 6 months prior to convention.
 - b. Prepare name cards, registration sheets, and any decorations to be used.
 - c. Create a theme for each convention.
3. Obtain, publish and maintain Sasse Class register (1939 to Present)
4. Create, publish, and maintain flyers for the association.
5. Create and publish convention booklet
6. Write and update a brief history of SOBA America.
7. Be the official photographer at convention and activities. Publish photos on website.
8. Work with the President to create a yearly calendar of the association activities.
9. Acknowledge recognitions presented to SOBA America and draft a thank you letter and present to President for review.
10. Review the association website to make sure it reflects its values and make recommendations to NEC for changes or additions.
11. Review all request for the use of the association logos or images. Make recommendation to the President if necessary.
12. Design the association letterhead
13. Make sure all association publication follow a predetermined standard (e.g. publications must be written in type font Arial 11 and must be in adobe acrobat (pdf), etc.). Create a style sheet
14. Keep written or printed account of the year's activities.
 - a. Include:

- i. List of SOBA America officers and Committee members;
 - ii. Convention delegate list;
 - iii. Program and focus group topics (names of speakers and leaders);
 - iv. Activities, projects carried out by SOBA America;
 - v. Any changes to bylaws;
 - vi. List of recipients of Service award, and other special awards or recognition presented to or received by SOBA America.
15. Take an opinion poll or use an online survey tool to discover the information that is most useful to members.
16. Publish results of pools and event activities.
17. Encourage others to contribute to publications especially the website and convention booklet. Tell them how much space is available for articles. Offer suggestions to assist them in their efforts.
18. Be on the alert for coming events that should be publicized.
19. Look for stories that reflect SOBA America values.
20. Protect the association from copyright laws. SOBA America respect all copyright laws and will abide by them.

Knowledge and Skills:

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Title: **Advisors**

Date: 1/2013

By Laws:

ADVISORS: The advisors are past presidents and current president can add new advisors as he deems necessary. All advisors added by new President shall cease to be advisors when a new administration takes office.

Job Duties and responsibilities (Standing rules):

1. Attend all NEC meetings
2. Act as roving ambassadors of SOBA America
3. Identify sources for fundraising
4. Identify future leaders and make recommendations to NEC
5. Sell SOBA America to your local chapters
6. Act as a resource to the current office holders.

Knowledge and Skills: