



# **Book 8**

## **Officer Transition**

**An overview of your responsibilities**

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### Officer Transition –A Brief Overview of Chapter Leadership Responsibilities

Each year, most chapters elect new officers to fill leadership positions. Although there are manuals available through Headquarters that can assist in their new roles, many new officers find themselves searching for clear and concise guidelines to help them achieve their objectives for the year.

With this in mind, we have developed this short book to provide you with useful tips on how to better fulfill your new leadership role. This booklet includes *guidelines* on specific duties and responsibilities for each leadership position.

**Note:** Throughout this material you will find job descriptions and suggested tips for each chapter leader. Although this book provides a general guideline for each leadership role, check to see if your chapter bylaws also include additional information. A detailed outline of each officer’s duties, including a month-by-month checklist, can be found in **Book 2** “*Duties of Officer Chapters*” of this manual; at [www.afe.org](http://www.afe.org) or you may call AFE Headquarters at (571) 203-7171.

As stated, most, if not all, information in this Book 8 is redundant with **Book 2**; but this book gives the general guidelines of the chapter officers for a “quick and dirty” reference. If more detail is required, please refer back to **Book 2**.

This book contains general responsibilities of:

- The Chapter President
- The Chapter Vice-President
- The Chapter Membership Chairman
- The Chapter Secretary
- The Chapter Treasurer

#### **Chapter President**

- Is the chief elected officer of the chapter
- Presides at all chapter meetings and meetings of the Executive Committee
- Serves as the ex-officio member of all chapter committees
- Conducts all meetings in accordance with AFE bylaws, Chapter bylaws and Robert’s Rules of Order
- Ensures that all officers and committee chairpersons perform their duties
- Have other duties as described in the chapter’s bylaws or operating procedures

#### **Suggested tips for the Chapter President Include**

- Work with the Vice President and the program chairman to develop a calendar of events for the year
- Act as main spokesperson for the chapter. The president should agree to represent AFE at other

meetings

- Make sure that all leaders in the chapter have clearly defined job descriptions
- Ensure that all necessary paperwork is sent to AFE Headquarters. For example, make sure the treasurer sends in the financial data form and the secretary turns in the officer report form at the beginning of each year
- Work with the Student Chapter advisor and the local AFE chapter liaison if one is assigned
- Serve as the contact person who submits articles or information to AFE Headquarters
- Work with the other chapter officers and committee chairpersons
- Recognize the hard work of chapter members by honoring them with a certificate or other form of recognition at a chapter meeting

### **Chapter Vice President**

- Assume the duties of the president in his/her absence
- Serves as the chairperson of the Chapter Program Committee
- Have other duties as described in the chapter bylaws or operating procedures

#### **Suggested tips for the Chapter Vice President include:**

- Work with the treasurer to prepare an operating budget for the year
- Attend any local training programs
- Attend all chapter board meetings
- Assist the treasurer in conducting chapter planning and budget committee meetings
- Work with Chapter Membership Chairman to coordinate surveys on chapter membership recruitment and retention

### **Chapter Membership Chairman**

- Reports directly to the Chapter President
- Coordinates membership retention and activities of chapter's new members
- Chairs chapter membership Committee
  - Develop annual goals/objectives for membership retention and new member recruiting
  - Develop and oversee implementation of plans in support of membership goals/objectives

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- Coordinate usage of prospective membership lists
- Coordinate hosting of prospective members
- Coordinate introduction of new members
- Coordinate and encourage existing member renewals
- Channels successful ideas/programs relating to recruiting and retention to the chapter president
- Coordinates and cooperates with other student chapter Membership Chairs to support membership recruiting and retention efforts

#### **Suggested tips for the Chapter Membership Chairman include:**

- Establish a public relations committee to promote AFE membership
- Participate in local trade shows and/or conferences to recruit new members
- Assist in providing speakers for chapter meetings. When publicized, this is a great way to invite new prospects to chapter meetings
- Work with other chapter officers in establishing a publications and periodicals committee to develop a chapter newsletter or a chapter membership directory
- Publications & periodicals can be sent via e-mail and/or placed on the chapter web site if they have one
- Provide surveys for prospects, new members and members who have left the chapter

### **Chapter Secretary**

- Record the minutes of all chapter meetings and other meetings as requested by the chapter president
- Maintain an accurate, up-to-date roster of chapter members, member demographics, etc. AFE website has latest database accessible to chapter officers
- Provide chapter members with notices of all regular or special chapter meetings
- Read (during the chapter meetings) all official correspondence received by the chapter; summarize reports the chapter received, etc
- Notify AFE Headquarters of changes in member contact information
- Submit a complete list of chapter officers to AFE Headquarters immediately after each chapter election
- Other duties and responsibilities as described in the chapter bylaws or operating procedures

**Suggested tips for the Chapter Secretary include:**

- Maintain an accurate list of new prospects at each chapter meeting. These names can be compiled into a large prospect base for the chapter
- Maintain an accurate chapter officer list and report any changes to AFE Headquarters

**CHAPTER TREASURER**

- Receive all income and make all expenditures on behalf of the chapter
- Maintain accurate and complete financial records for the chapter
- File all financial forms and reports as needed by the local, state and federal government or AFE
- Make regular reports of the chapter's financial status to chapter membership
- Have other duties as described in the chapter bylaws or operating procedures

**Suggested tips for the Chapter Treasurer include:**

- Establish a planning and budget committee to assist with the financial administration of the chapter
- Submit to Headquarters a yearly financial data form
- Make sure the chapter has its own EIN (Employer Identification Number.) For chapters without an EIN number, a form and contact information is available on the AFE web site. Contact AFE Headquarters or go online to [irs.gov](http://irs.gov) for an online application. **IMPORTANT TAX INFORMATION** is contained in Book 11 of this manual...**MUST READ**
- Create a chapter financial handbook. Pertinent information to include in the would be a listing of the financial management responsibilities of the treasurer, steps involved in preparing a budget and cash management practices to follow with checking accounts, reserves and investments.

***Don't forget***

As a chapter officer you have the opportunity to develop relationships with everyone in the chapter. Committees are an important way to accomplish great things and give everyone in the chapter a chance to contribute and participate. There are numerous committees that a chapter leader can develop. Outside of the nominating committee, membership committee and program committee, additional committees could be developed as needed by the chapter.