

Chapter Officer's Responsibilities Checklist

In order to maintain an effective Chapter that meets its goals and objectives, it is important that the Chapter officers delegate responsibility and administer the operations of the Chapter. The following is a suggested checklist to assist the Chapter officers with the general management of their Chapter (*For specific job descriptions, please consult the Chapter Officer & Committee Job Description Toolkit*):

General Responsibilities

- Abide by the IADD Constitution and Bylaws, as well as Chapter Bylaws.
- Perform all legal and financial requirements as noted in the *Legal & Financials Procedures Toolkit*.
- Represent, promote, and sponsor the IADD activities, programs and services.
- Actively promote the IADD membership to non-members, as well as attendance to IADD events by both members and non-members.

Annual Responsibilities (General)

- Plan a Chapter officer's retreat/orientation no less than after each Chapter election, but preferably annually.
- Chapter officers should review the current IADD Bylaws and Strategy Blast
- Review Chapter Bylaws.
- Review Chapter Toolkits and other Chapter management resources provided to the IADD Chapters.
- Establish/revise the Chapter's goals and objectives for the year.
- Distribute Chapter Officer job descriptions to current officers.
- Chapter Chairperson appoints committee chairpersons (if applicable); distribute job descriptions to Chapter committee chairpersons.
- Review expectations of volunteer time necessary for Chapter officer positions, not including volunteering at Chapter meetings.
- Prepare Chapter's master calendar of events, including Chapter meetings and events, and Chapter officer meetings/conference calls (ie. Board of Directors meetings).
- A minimum of two educational meetings should be held each year.

- ❑ Notify designated Regional Vice President and IADD Headquarters of meeting dates.
- ❑ Prepare annual budget. It is strongly recommended and is sound financial practice that Chapters prepare an annual Chapter budget that will assist them in their financial activities throughout the year. Although a budget is a fluid document and can be adjusted, it allows the Chapter Board a gauge of appropriate expenditures throughout the year. In addition, it is recommended that the Chapter budget be presented to the Chapter membership at a designated Chapter meeting (as determined by the Chapter officers)—a “State of the Chapter” address if you will.

Date Specific/Ongoing Responsibilities (General)

- ❑ **September**
 - At least one Chapter officer must attend the IADD Annual Meeting.
 - New Chapter leadership terms become effective at the end of the IADD Annual Meeting.
- ❑ **November 1st**
 - If requested, Chapter must submit updated contact information etc. to the IADD Headquarters Office for renewal of IADD Chapter Incorporation.
- ❑ **January 31st**
 - If requested, Chapters should submit an interim financial report to the IADD Headquarters Office. In addition, it is a good idea for the Chapter Treasurer to periodically update the other Chapter officers on the financial state of the Chapter.
- ❑ **March**
 - At least one Chapter officer must attend the IADD Midyear Meeting.
- ❑ **April 30th**
 - **Annual Income Statement:** Submitted to the IADD by April 30th.
 - **Balance Sheet:** Submitted to the IADD by April 30th.
- ❑ **April**
 - Chapters should start the nomination process for the election of Chapter officers. Note: While, Chapters have traditionally held their elections in the spring, Chapters may opt to hold their elections at a different time in the year.

May

- Chapter elections take place at a Chapter meeting, by mail, email, fax or by a combination of all four. Written notification of the newly elected incoming officers should be forwarded to the IADD Headquarters Office.
- Plans should be made for upcoming Chapter activities and the IADD Headquarters Office should receive written notification of such activities.

June

- Outgoing officers should brief incoming officers on any official responsibilities, when they take office in September.

August 1st

- Form 990 should be submitted to IADD if required.

Ongoing

- Chapters should hold **at least 2** substantive (technical) Chapter meetings a year.
- **IRS Form 1099-Misc.:** If the Chapter has hired an individual for services rendered for the amount of \$600 or more, the Treasurer must provide the IADD Headquarters the individual's name, address, social security number and the monetary amount they were paid. The IADD's accountant will then file IRS Form 1099-Misc. on behalf of the Chapter.
- **Event Specific Financial Report:** Chapters who maintain their own bank accounts, must submit to the IADD the "Income Statement for Chapter Meeting Event" form **within 30 days of the Chapter meeting/event**. Note: this is not the same form as the annual Income Statement form, which is required on an annual basis.
- **Contracts:** Chapter officers should not sign any contract associated with Chapter activities, for example, a hotel contract for a Chapter meeting. Instead, when a Chapter is planning a Chapter meeting at a venue that requires a contract, the contract should be forwarded to the Member Relations Coordinator at the IADD Headquarters Office for review and to be signed.
- Chapter Secretary should forward an updated Chapter Officer Roster, if there is a change in the Chapter roster, specifically if there is a position change.
- Chapter Chairs should contact their designated Regional Vice President to update him/her on:

- Upcoming meetings and events (note meeting details—date, time, location, subject).
- Any current issues that require assistance from the Regional Vice President.
- Chapter Chairs should contact the IADD Member Relations Coordinator to update him/her on:
 - Upcoming meetings and events (note meeting details—date, time, location, subject).
 - Any current issues/assistance needed regarding Chapter management issues etc.
 - Review the current month's Chapter Management Tips.