



## **Building a Successful Chapter: Chapter Governance & Job Descriptions**

*Thank you for your interest in chapter governance and job descriptions. A key to your chapter's success is a strong governance & operational structure and the underlying job descriptions. This is the foundation on which you build programs and services that meet your members' needs and allow you to grow and thrive.*

*The information presented here will work equally well for national, regional and local associations. Mariner's staff compiled the information through many years' experience and many hours of sharing ideas and information with other association executives. We work with national/state and regional organizations as well as their components to help each achieve their goals. If you have any questions about leadership structure or training, or would like to explore association management options, please contact us at 301-725-2508 or [info@MarinerManagement.com](mailto:info@MarinerManagement.com).*

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## Chapter Governance

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**Voting Members**

*Elect*

**Board of Directors**

*Elect*

**Officers & Executive Committee**

*Hire*

**Chapter Administrator**

## **Chapter Board/Committee Responsibilities** \_\_\_\_\_

### **Board of Directors**

- Elects officers
- Develops strategic plan & approves budget
- Monitors, evaluates and adjusts plan and budget
- Establishes committees as needed

### **Committees and Chapter Administrator**

- Execute strategic plan
- Report results to board of directors

### **Standing Committees (Chair)**

- Executive (President) – manages chapter between board meetings and hires Chapter Administrator
- Membership (Vice President) – develops and implements membership recruitment/retention programs
- Finance (Treasurer) – develops proposed budget and reviews finances
- Nominations & Elections (Past President) – conducts nominations and elections of directors and officers

### **Sample Program Committees**

- Education – plans and conducts conferences, seminars, etc.
- Social – plans and conducts golf outings, banquets, etc.
- Promotion – plans and conducts industry awareness campaigns
- Newsletter – produces and distributes newsletter

## **Chapter Board/Committee Composition**

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### **Board of Directors**

- President
- Vice President
- Past President
- Treasurer
- Secretary
- Directors (at least 3)

### **Executive Committee**

- President
- Vice President
- Past President
- Treasurer
- Secretary
- Board representative to executive committee

### **Membership Committee**

- Vice President
- Directors (at least 2)

### **Finance Committee**

- Treasurer
- President
- Vice President
- Past President

### **Nominations & Elections Committee**

- Past President
- Secretary
- Directors (at least 1)

## **Chapter Job Descriptions**

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### **PRESIDENT**

**Primary Role:** Oversees the planning and administration of all chapter activities.

**Key Responsibilities:**

1. Coordinates development/update of the chapter's strategic plan.
2. Oversees execution of chapter functions and programs dictated by chapter's strategic plan including:
  - a. Membership recruitment & retention
  - b. Marketing & communications
  - c. Accounting & finance
  - d. Meetings & events
  - e. Other chapter programs as necessary
3. Assures adherence to association operational policies and procedures and compliance with ethical standards.
4. In consultation with fellow officers and chapter administrator:
  - a. calls, sets agenda for, and presides over all meetings of the board of directors and executive committee;
  - b. appoints volunteers to standing and ad hoc committees.
5. Executes contracts and other instruments on behalf of the chapter as authorized by the Board of Directors.
6. As necessary and appropriate, serves as the chapter's official representative and spokesperson to the local media, public and institutions.
7. Serves as primary liaison to the national association.

**Elected By:** Board of Directors

**Length of Term:** One year

**Staff Support:** Chapter Administrator

**Qualifications:**

- Membership in the chapter and national association
- Demonstrated leadership in a volunteer environment
- A commitment to the chapter and its values, and an understanding of the chapter's objectives, organization, and services
- Knowledge of and influence in the chapter's industry/profession.
- Ability to understand and communicate ideas

## **VICE PRESIDENT (PRESIDENT-ELECT)**

**Primary Role:** Assists president in the planning and administration of all chapter activities and assumes presidency in the president's absence.

### **Key Responsibilities:**

1. Works closely with president in development/update of the chapter's strategic plan.
2. Chairs membership and at least one other key program committee.
3. In the president's absence,
  - a. Presides over executive committee and board of directors meetings;
  - b. Serves as the chapter's official representative and spokesperson to the local media, public and institutions; and
  - c. Serves as primary liaison to the national association.

**Elected By:** Board of Directors

**Length of Term:** One year

**Staff Support:** Chapter Administrator

### **Qualifications:**

- Membership in the chapter and national association
- Demonstrated leadership in a volunteer environment
- A commitment to the chapter and its values, and an understanding of the chapter's objectives, organization, and services
- Knowledge of and influence in the chapter's industry/profession.
- Ability to understand and communicate ideas

## **PAST PRESIDENT**

**Primary Role:** Chairs Nominations & Elections Committee

**Key Responsibilities:**

1. In close coordination with secretary, and chapter administrator, conduct nominations and elections of directors as specified in the chapter by-laws.
2. Conduct nominations & elections of officers as specified in the chapter by-laws.
3. Provide counsel to president as requested.

**Term of Office:** One Year

**Qualifications**

- Membership in the chapter and national association
- Past president of chapter
- A commitment to the chapter and its values, and an understanding of the chapter's objectives, organization, and services

## **SECRETARY**

**Primary Role:** Oversees nominations and elections of directors and recording of chapter meeting minutes.

### **Key Responsibilities:**

1. In close coordination with past president and chapter administrator, conduct nominations and elections of directors as specified in the chapter by-laws.
2. In close coordination with chapter administrator, record minutes of board of directors and executive committee meetings.
3. Assure that by-laws, articles of incorporation and other corporate documents are properly filed and kept up-to-date.

**Elected By:** Board of Directors

**Length of Term:** One year

**Staff Support:** Chapter Administrator

### **Qualifications:**

- Membership in the chapter and national association
- A commitment to the chapter and its values, and an understanding of the chapter's objectives, organization, and services
- Ability to understand and communicate ideas

## TREASURER

**Primary Role:** Oversees accounting and reporting of all financial transactions conducted by the chapter.

### **Key Responsibilities:**

1. Oversees preparation of the budget.
2. Serves as chair of the finance committee.
3. Ensures that accurate books and records on financial condition are maintained.
4. Ensures that assets are protected and invested according to chapter policy.
5. Ensures that the chapter complies with corporate and statutory reporting requirements.
6. Ensures that comprehensive financial reports to the board are prepared and presented in a timely and accurate manner.
7. As specified by chapter operating procedures, reviews and approves all invoices prior to payment.

**Elected By:** Board of Directors

**Length of Term:** One year

**Staff Support:** Chapter Administrator

### **Qualifications:**

- Membership in the chapter and national association
- A commitment to the chapter and its values, and an understanding of the chapter's objectives, organization, and services
- A strong command of accounting procedures and financial reporting.
- Ability to understand and communicate ideas

## **BOARD MEMBER**

**Primary Role:** Actively serves on the board of directors and at least one committee.

### **Key Responsibilities:**

1. Prepares for, attends and contributes to discussion at all board of directors meetings.
2. Actively participates on at least one committee.
3. Promotes the association to peers and others as appropriate.

**Elected By:** General Membership

**Term:** Two (or Three) Year; Can serve no more than 2 consecutive terms

### **Qualifications:**

- Membership in the chapter and national association
- A commitment to the chapter and its values, and an understanding of the chapter's objectives, organization, and services
- Ability to understand and communicate ideas

## **COMMITTEE CHAIR**

**Primary Role:** Plans and manages committee activity.

### **Key Responsibilities:**

- In consultation with President, selects committee members.
- Works with committee to develop action plan based on goal(s) specified by board.
- Calls, prepares agenda for, and chairs committee meetings.
- Monitors activity and reports results to President as requested.

**Appointed By:** President (w/approval of Executive Committee)

**Term:** One Year

### **Qualifications:**

- Membership in the chapter and national association
- A commitment to the chapter and its values, and an understanding of the chapter's objectives, organization, and services
- Ability to understand and communicate ideas
- Strong interest in the specific activity for which the committee was established

## CHAPTER ADMINISTRATOR

**Primary Role:** Provides administrative support to volunteer leaders.

### **Key Responsibilities:**

1. Sets up and maintains the following systems:
  - a. Membership database
  - b. Dues billing
  - c. General accounting
  - d. Document filing
  - e. Communications (postal, telephone, fax, e-mail)
2. In close coordination with the president, makes necessary facility arrangements, sends out notices and prepares relevant materials for board of directors and executive committee meetings.
3. In close coordination with secretary, conducts nominations and elections of directors and records minutes of board of directors and executive committee meetings.
4. In close coordination with treasurer, collects receivables, tracks and pays all invoices, prepares financial reports and files appropriate tax returns and other legal documents.
5. Provides administrative support to program committees as approved and funded by the board of directors.

**Hired By:** Executive Committee

### **Qualifications:**

- Member of ASAE or local society of association executives
- A commitment to the chapter and its values, and an understanding of the chapter's objectives, organization, and services
- Meeting planning experience
- Proficient with basic computer programs (word processing, e-mail, database, spreadsheet and accounting)
- Proficient with basic bookkeeping and financial reporting procedures
- Ability to understand and communicate ideas