



## Checklist Secretary

### May/June

- ❖ Meet with the outgoing Chapter Secretary to receive chapter membership records, electronic files, Minute book, and to transition responsibilities as soon as possible.
- ❖ Meet with the Chapter Treasurer to reach agreement on process for sharing membership information, payment information, and so forth. [Recommend that Treasurer scans and forwards to you a copy of every membership application received, as they are received, so you can record membership information in database.]
- ❖ Meet with the Chapter Program Chair to reach agreement on process for obtaining monthly speaker information for inclusion in monthly meeting reminder.

### July

- ❖ Obtain information from Program Chair and create flyer (if necessary) for Meet & Greet function.
- ❖ Prepare email communication to members and potential members inviting them to the August Meet & Greet function (two week prior; one week prior; and last day to register.)

### October

- ❖ Submit membership list to Association as of September 30.

### March

- ❖ Draft and send email to membership regarding solicitation of nominations for Board Officers.

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### Monthly

- ❖ Create program flyer with speaker information; print 45 – 50 copies for meeting.
  - ❖ Email all participants regarding meeting two-weeks, one-week and last day to register.
  - ❖ Maintain record of RSVP's received by phone, email and online; record in database.
  - ❖ Double-check online registrations to ensure all participants are included.
  - ❖ Create sign-in sheet for monthly meeting.
  - ❖ Create minutes from meeting; email to Board for edits.
  - ❖ Set up registration table 30 minutes prior to start of networking; check attendees into the meeting.
  - ❖ Follow-up on any “bounced-back” emails to ensure distribution list emails are correct; update as necessary.
  - ❖ Provide new member information to Roman (web developer) so that he can update website member information one week prior to each meeting.
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### **On-going**

- ❖ Prepare and email new job announcements to distribution list every Wednesday.
- ❖ Assist President by creating ad-hoc reports as requested from time to time.
- ❖ Maintain frequent communication with Treasurer related to status of memberships.

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### **Spring Activities & Conference**

- ❖ Update Chapter Membership Application.
- ❖ Prepare email communication to members and potential members, inviting them to the Spring Conference (one month prior; two weeks prior; one week prior; and last day to register.)
- ❖ Draft and send email to membership regarding any By-Laws revisions; follow-up with email ballot after 30 days.
- ❖ Create ballot for selection of Board Members during Spring Conference.