

## Vice President (1-3)

### **Eligibility**

Must be a Professional member in good standing and sign the Chapter Volunteer Code of Conduct.

### **Authority**

The authority of the Chapter Vice President is conferred by the Chapter membership through election, and as specified in the National AMTA Bylaws, Policy and Chapter Standing Rules, (if existent).

### **Accountability**

The Chapter Vice President is accountable to the Membership by virtue of election and the Chapter Board, the Membership, and the AMTA National Board through reporting activities. The Chapter Vice President agrees to uphold and abide by National AMTA Bylaws, Policy, Job Description, Chapter Volunteer Code of Conduct, Chapter Standing Rules (if existent), and Financial Policies & Procedures.

### **Term of Office**

The First and Third Vice Presidents shall be elected every odd year for a term of two (2) years or until successors are elected.

The Second Vice President shall be elected every even year for a term of two (2) years or until a successor is elected.

### **Relationships**

The Chapter Vice President works most closely with Chapter Board members and appointees, Chapter staff or consultants, and National AMTA staff. The Chapter Vice President also communicates with Chapter members, other Chapter Vice Presidents, the Chapter Relations Committee, Chapter Relations Department, and/or other National volunteers, as appropriate.

### **Responsibilities**

1. Is a voting member of the Chapter Board of Directors and is familiar with Robert's Rules of Order.
2. In the temporary absence or incapacity of the Chapter President, the 1<sup>st</sup>, 2<sup>nd</sup> or 3<sup>rd</sup> Vice President, in that order, serves in the place of the President.
3. In the event the office of the President becomes vacant, may succeed to the office of President according to AMTA Bylaws and Policy.
4. Accepts responsibilities for Chapter/Association assignments as delegated by the Chapter President.
5. May have signature registered with the bank servicing the Chapter and with any other financial institution serving as depository of funds.
6. May temporarily assume the responsibilities of vacant volunteer positions while working with the President, the Chapter Relations Committee and staff to fill the vacancy.
7. Shall not be the Chair of more than two (2) committees, sub-committees, special committees or workgroups.

8. Attends Chapter Board, Chapter membership, and any Chapter committee meetings for which the Vice President has responsibility, and, whenever possible, regional and national meetings of the Association.
9. Identifies, cultivates and recruits future Chapter leaders.
10. Makes recommendations to the Chapter President for committee appointments.
11. Directs and refers members to appropriate volunteer and staff contacts as needed.
12. Is available to receive direct feedback from members for input to the Chapter Board, and to communicate to inquiring members, appropriate information regarding actions of the Chapter Board.
13. Maintains communication with Chapter membership through regular reports via Chapter newsletter, and reports at Chapter membership and Chapter Board meetings.
14. Fulfills the fiduciary, due diligence, and other responsibilities of Chapter board members as described in National Bylaws and Policy, Chapter Volunteer Code of Conduct and Chapter Standing Rules and Policies.
15. Maintains orderly records of activities and timelines relevant to her/his position during the term and supplies the incoming Vice President with those records to ensure a smooth transition.

## Chapter Treasurer

### **Eligibility**

1. Must be a Professional member in good standing and sign the Volunteer Code of Conduct.
2. Completed one year of AMTA membership and have experience in bookkeeping, accounting or finance.

### **Authority**

The Chapter Treasurer is given authority by the Chapter membership through election and as specified in the National AMTA Bylaws, Policy and Chapter Standing Rules.

### **Accountability**

The Chapter Treasurer is accountable to the membership by virtue of election and to the Chapter Board and the membership through reporting activities. The Chapter Treasurer agrees to uphold and abide by National AMTA Bylaws, Policy, Job Description, Chapter Volunteer Code of Conduct, and Chapter Standing Rules (if applicable), and Financial Policies & Procedures.

### **Term of Office**

Treasurer is elected every even year for a term of two (2) years or until a successor is elected.

### **Relationships**

The Chapter Treasurer works most closely with Chapter Board members and appointees, and National AMTA staff. The Chapter Treasurer also communicates with Chapter members, the Chapter Relations Committee, Chapter Relation's and Finance staff, and/or other National volunteers, as appropriate.

### **Responsibilities**

1. Serves as a voting member of the Chapter Board of Directors.
2. Has basic knowledge of QuickBooks.
3. Attends all Chapter meetings and Chapter Board meetings, as scheduled.
4. Is a signatory on all Chapter accounts per AMTA Policy.
5. Acts in the place of the President in the absence or incapacity of the President, Vice Presidents and Secretary.
6. Accepts responsibilities delegated by the President.
7. May temporarily assume the responsibilities of vacant positions while working with the President, the Chapter Relations Committee and staff to fill the vacancy.
8. Shall not be the Chair of more than two (2) committees, sub-committees, special committees or workgroups.
9. In cooperation with the President, conducts the regular day-to-day

financial business affairs of the Chapter.

10. Adopts and uses the Chapter Internal Controls detailed in AMTA Policy.
11. Completes and submits reports in compliance with AMTA Policy.
12. Manages and oversees the Chapter Budget.
13. In collaboration with Chapter Board members and/or Chapter Finance Committee, prepares the annual Chapter budget, for presentation to the Chapter Board and the Chapter membership for approval.
14. Ensures that Chapter records are maintained according to the Chapter record retention guidelines, and submits required reports to the National Office.
15. Ensures that expenses are budgeted and allowable.
16. Provides information to the Chapter Board regarding budgetary restrictions and alerts the Chapter Board when projects, programs, or units are in danger of going over budget.
17. Brings all unapproved and/or unbudgeted requests for funds and payment to the Chapter Board.
18. Proposes cost cutting measures and budget adjustments.
19. Reports line item financial status of the Chapter, actual vs. budgets, to the Chapter Board quarterly and to the Chapter members annually.
20. Manages Chapter finances and keeps accurate records of all income and expenses in QuickBooks.
21. Keeps the Chapter Board current regarding status of investments, when applicable.
22. Reimburses members, appointees, or other volunteers, in accordance with Chapter standing rules or Chapter policy, for budgeted or approved expenditures made on behalf of the Chapter.
23. Reviews Chapter expenditures and financial status on a regular basis to ensure overall fiscal responsibility.
24. Updates Chapter Financial Policies and Procedures annually for Chapter Board of Directors approval, when applicable.
25. Maintains orderly financial records and an outline of the procedures used and furnishes the incoming Treasurer with those records.
26. Communicates with Chapter membership, through regular reports, the financial status of the Chapter, including income and expenses to date and account balances.
27. Identifies, recruits, cultivates, and mentors future Chapter leaders.
28. Makes recommendations to the President for committee appointments.
29. Directs and refers members to volunteer and staff contacts as appropriate.
30. Receives direct feedback from members and answers their questions

about actions of the Chapter Board.

31. Ensures Chapter financial operations are consistent with AMTA National Bylaws and Policy, and Chapter Standing Rules.

32. Fulfills fiduciary, due diligence, and other responsibilities as described in AMTA Bylaws and Policy.