SME Chapters: Officer Duties

Secretary

1. Creating agendas for all board meetings (sometimes done by Chairperson).
2. Recording of meeting minutes.
3. Filing of the following documents:
   - Meeting minutes
   - Treasurers’ report
   - Handouts from meetings
4. Forwarding copies of minutes to the following recipients:
   - All in attendance of meeting
   - Chapter executive committee and committee chairs
5. Order supplies from SME H.Q. Telephone: 1-800-733-4SME
6. Filing of year end reports:
   - Chairperson’s Annual Report
   - Annual Financial Report
   - Officer Listing
7. Showing your successor the “ropes”

Treasurer

1. Ensuring financial well being of chapter
2. Collection of revenues
3. Banking duties
4. Payment of expenditures
5. Preparation of monthly Treasurer’s Report
6. Filing of all financial documents
7. Showing your successor the “ropes”

Chair Elect

1. Develop an Operating Plan or Short-range Plan for upcoming year - include meetings and events
2. Develop a budget
3. Chair committee to revise the long-range strategic plan for your chapter (include former chapter chairpersons on committee if possible)
4. Chair the nomination committee (include former chapter chairpersons on committee if possible)
5. Member retention
6. Member recruitment
7. Showing your successor the “ropes”

Chairperson

*Execute the plan developed in the previous year and oversee the health of the chapter*

1. Lead and motivate your chapter
2. Lead and motivate your chapter officers
3. Delegate authority and responsibilities
4. Answer policy and procedure questions (SME Governance document)
5. Member retention
6. Member recruitment
7. Chair and conduct Monthly Executive Board meetings.
8. Insuring that required chapter reports are complete and submitted on schedule
9. Establishing a budget and providing oversight
10. Showing your successor the “ropes”

Other Positions

Can be added as needed and may consist of an officer and/or committee.

*Note: Members added to the Executive Board must be elected to a position in order to hold voting rights at the Executive Committee Meeting.*

Some examples are:

- Technical programs
- Special Project(s)
- News Bulletin
- Web Master
- Publicity
- Membership
- Strategic Planning
- Historian
- Certification
- Audit
- Honor Awards
- Constitution & Bylaws
- Student Chapter Liaison

Annual Chapter Reports

This is SME HQ’s only formal method of knowing the condition of your chapter!

- It is so important that the quarterly allocations to your chapter will **not** be sent until the required reports are sent.
- If your chapter does not send the reports, your chapter will **not** get its financial allocations

**Report due dates:**

**Officers List:**
- December 15th of current year
- October 15th for Students

**Financial Report:**
- January 31st of next year
- April 15th for Students

**Effectiveness Guide:**
- January 31st of next year
- April 15th for Students