

Arizona Council of Chapters



Chapter Position Responsibilities Guide

Chapter Position Responsibilities Guide – Ver 05

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Introduction

The 2015 MOAA Council and Chapter Policies and Procedures Guide recommends that chapters "Develop a chapter *Operations Handbook* containing the chapter's bylaws, a brief summary of [position] descriptions of the various leadership positions, and any other material that can help individuals understand what the various duties and responsibilities involve." (Refer to Leadership Development and Strategies for Succession on page 37).

This guide was developed by our Arizona chapters to address the latter two aspects of the aforementioned recommendation. Its purpose was to capture all the "potential" positions and responsibilities that a given chapter may require—regardless of chapter size and scope of operations—so that our individual chapters can "tailor" each of the applicable positions and responsibilities to their needs. Realistically, no one chapter will likely employ all the identified positions along with each of the listed responsibilities but this overly comprehensive guide gives us all a common means—despite our obvious diversity—to address our collective current and future challenges regarding chapter operations and leadership succession.

If you have any questions regarding the contents of the guide and/or the methodology used to develop it, please contact the Project Facilitator at knightnl@live.com or 928-287-9915.

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Update Recommendations (Add/Change/Delete)

This guide is to be considered a living document that will evolve over time through updates. Most update recommendations will occur early in the process of refining the guide and as it becomes more sorted-out the need for updates will naturally diminish, however the update recommendation process will remain in place as long as there is a facilitator to oversee it.

Updates related to responsibilities identified in the MOAA Council and Chapter Guide and the Level of Excellence Application will be made automatically and do not require chapters to submit update recommendations.

Any chapter can submit update recommendations for those responsibilities derived from chapter input (i.e., those responsibilities listed throughout in [blue text](#)). For simplicity, update recommendations are limited to the following three types:

Add - A recommendation to add a responsibility to a given position (Used to address a responsibility already in practice but not yet listed in the guide or to identify responsibilities associated with a new function.)

Change - A recommendation to change the verbiage of an existing responsibility for a given position (Used to make a particular responsibility more universally applicable or correct ambiguity.)

Delete - A recommendation to delete an existing responsibility from a given position (Used to eliminate redundancy with another listed responsibility or purge a responsibility that is universally accepted as no longer applicable.)

Note: All potential update recommendations that involve deleting a responsibility from one position and adding it to another should first be weighed against simply delegating that responsibility to another position holder within the chapter. If the potential update recommendation appears to apply universally to all Arizona chapters (or at least a clear majority of them) then it should be submitted for review, however, if the practice is somewhat unique to your chapter then delegation is likely the more appropriate course. Additionally, it is important to document those responsibilities that we do choose to delegate. At a minimum, the pertinent information should be annotated in the margin of the respective pages of the position the responsibility was delegated from and that of the position the responsibility was delegated to.

Update recommendations can be made via email (preferred method) or submitted in person at an AZCOC meeting. Use the following format for update recommendations: Position / Recommended Update Description / Rationale.

Example: *Secretary / Change 4.I.(3) – “PO Box” to “mailbox” / Mailbox is a more generic term; not all chapters have PO Boxes.*

Submit update recommendations to the Project Facilitator at knightnl@live.com.

New versions of the guide will be released to reflect updates that have been incorporated. Each will contain a summary of updates to the previous version.

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Summary of Updates to the Previous Version

1. Admin Correction – Changed the word billet in the guide’s title to position
2. Admin Correction – Changed the word billet throughout the guide to position
3. President – Changed 1.i. to read: “Ensure the chapter’s Legislative Chair/Liaison opts-in to receive MOAA Legislative Updates;” / Deleted portion is now assigned to the Committee Module Administrator
4. President – Deleted 1.j.: “Ensure the chapter has a designated Membership Chair and Surviving Spouse Liaison in the [Committee Module];” / This responsibility is now assigned to the Committee Module Administrator
5. First and Second Vice President – Changed 2.c.(4) to read: “Oversee the annual independent audit of the chapter’s financial records;” / Replacing the word “perform” with “oversee” signifies a Vice President does not have to personally perform the annual independent audit of the chapter’s financial records
6. Secretary – Deleted 4.e. / This responsibility is now assigned to the Committee Module Administrator
7. Secretary – Changed former 4.l.(2) to read: “Coordinate with Membership Chairman and Committee Module Administrator on membership roster changes;” / Former Roster Contact responsibilities now fall under the Committee Module Administrator
8. Surviving Spouse Liaison – Changed 8.b to read; “Work directly with national MOAA’s Surviving Spouse Advisory Committee (SSAC);” / Admin change missed in update to Ver 4
9. Membership Chairman – Deleted 10.d., e., and f. / These responsibilities are now assigned to the Committee Module Administrator
10. Membership Chairman – Changed new 10.e.(1) to read: “Coordinate with the Committee Module Administrator regarding changes to the membership roster;” / Separate coordination not required with the Treasurer and Secretary due to new 10.e.(6)
11. Membership Chairman – Changed new 10.e.(6) to read: “Forward updated membership roster to chapter officers, directors, and committee chairmen whenever substantive changes are made;” / Updated for clarification intended recipients
12. Newsletter Editor – Changed 14.e. to read: “Solicit the most current contact information from the Committee Module Administrator each month in preparation for newsletter distribution;” / Former Roster Contact responsibilities now fall under the Committee Module Administrator
13. Webmaster – Deleted 15.a. / No longer a LOE related responsibility
14. Committee Module Administrator – Added as a new chapter position / Assumes new responsibilities and some responsibilities previously assigned to other chapter positions
15. Committee Module Administrator – Added: “Periodically verify national MOAA membership status of chapter members;” as 16.a. / Replaces former 10.f.

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16. Committee Module Administrator – Added: “Confirm chapter officers are national MOAA members or the spouse of a national MOAA member in good standing;” as 16.b. / Replaces former 10.e.
17. Committee Module Administrator – Added: “Perform a comprehensive CM review/update between 1 January and 31 March each year;” as 16.c. / Replaces former 10.d
18. Committee Module Administrator – Added: “Ensure timely CM update of chapter officer positions following elections and related occurrences;” as 16.d. / Replaces former 1.h.
19. Committee Module Administrator – Added: “Ensure the CM properly reflects those individuals designated as Legislative Chair, Membership Chair, and Surviving Spouse Liaison;” as 16.e. / Replaces former 1.i. and 1.j.
20. Committee Module Administrator – Added: “Perform other duties as are necessarily incident to the office of the Committee Module Administrator, such as:” as 16.f. / Lead-in for 16.f.(1) through 16.f.(11)
21. Committee Module Administrator – Added: “Ensure CM access and use is in accordance with the Council and Chapter CM 2.0 Instructions;” as 16.f.1(1) / New responsibility
22. Committee Module Administrator – Added: “Obtain login credentials from MOAA;” as 16.f.(2) / New responsibility
23. Committee Module Administrator – Added: “Periodically verify the accuracy of Member Records and Officer Positions and that no duplicate membership records exist;” as 16.f.(3) / New responsibility
24. Committee Module Administrator – Added: “Add new chapter members to the CM;” as 16.f.(4) / New responsibility
25. Committee Module Administrator – Added: “Add start and/or end dates for chapter officer and committee positions;” as 16.f.(5) / New responsibility
26. Committee Module Administrator – Added: “Ensure satellite members are reflected in host chapter CM, if applicable;” as 16.f.(6) / New responsibility
27. Committee Module Administrator – Added: “Review monthly Near Real Time (NRT) potential member recruitment lists;” as 16.f.(7) / New responsibility
28. Committee Module Administrator – Added: “Master the ability to sort, export, print, and email CM records;” as 16.f.(8) / New responsibility
29. Committee Module Administrator – Added: “Ensure all CM data and records are maintained in a secure manner, password-protected, and accessible only by authorized chapter leaders;” as 16.f.(9) / New responsibility
30. Committee Module Administrator – Added: “Contact MOAA Member Service Center (MSC) at 800-234-6622 or MSC@moaa.org regarding CM related questions or recommendations;” as 16.f.(10) / New responsibility
31. Committee Module Administrator – Added: “Perform other duties the President might assign.” as 16.f.(11) / New responsibility

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1. President. The President's responsibilities are:
 - a. *Serve as the chapter's chief elected officer;*
 - b. *Preside at meetings of the chapter and of the Board of Directors;*
 - c. *Appoint all standing and special committees except the nominating committee;*
 - d. *Serve as an ex-officio member, with the right to vote, on all committees except the nominating committee;*
 - e. *Communicate to the chapter or to the Board of Directors information or proposals to help the chapter achieve its mission;*
 - f. *Serve as the chapter's principal delegate to the state council of chapters;*
 - g. *Appoint liaison representatives to local military bases by formal letter to the base commander, when or where appropriate;*
 - h. *Ensure an updated chapter officer list is submitted to national MOAA every year;*
 - i. *Ensure the chapter's Legislative Chair/Liaison opts-in to receive MOAA Legislative Updates;*
 - j. *Ensure the chapter belongs to the state council;*
 - k. *Ensure the membership is actively engaged in chapter-level activities such as those referred to in "Subjective" Scoring Section 1 of the current Chapter LOE Rating Sheet;*
 - l. *Ensure the chapter has a well-defined leadership succession plan;*
 - m. *Personally opt-in to receive the Affiliate newsletter and/or the Council and Chapter Monthly Update;*
 - n. Perform other duties as are necessarily incident to the office of the President, such as:
 - (1) *Seek and identify members to join the chapter Board of Directors;*
 - (2) *Prepare chapter social/board meeting agendas;*
 - (3) *Serve as chapter liaison/representative with national MOAA, local veterans/military organizations, and local community/civic organizations;*
 - (4) *Ensure compliance with chapter policies and procedures as outlined in applicable documents and references;*
 - (5) *Oversee recognition and awards programs;*
 - (6) *Appoint members to non-committee chapter positions;*
 - (7) *Provide input to the chapter newsletter;*
 - (8) *Oversee the preparation and timely submission of the Level of Excellence application;*
 - (9) *Draft and submit a "Semiannual Report to the AZCOC" twice annually in advance of the Spring and Fall AZCOC meetings by their respective published deadlines; and*
 - (10) *Provide guidance to chapter committees (e.g., intent, scope, budget, etc.).*

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2. First and Second Vice President. (Note: These responsibilities were consolidated for flexibility and should be apportioned as the as the President deems appropriate.) The Vice Presidents' responsibilities are:

- a. Perform the duties of the next higher office should it be vacated, either temporarily or permanently;
- b. Serve as a member of the Board of Directors;
- c. Perform other duties as are necessarily incident to the office of the Vice President, such as:
 - (1) Be knowledgeable of the President's responsibilities and represent the chapter at local/state/national events in the President's absence as required;
 - (2) Serve as chairperson/member of the *(fill-in-the-blank)* committee;
 - (3) Chair ad-hoc committees involved in review of chapter policies and procedures (e.g., Chapter Bylaws, Chapter Operations Handbook, etc.);
 - (4) Oversee the annual independent audit of the chapter's financial records; and
 - (5) Perform other duties the President might assign.

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3. Treasurer. The Treasurer's responsibilities are:
- a. Collect annual dues;
 - b. Maintain a record of all monies received and expended by the chapter;
 - c. Make disbursements authorized by the chapter or Board of Directors;
 - d. Deposit all sums received in a financial institution approved by the Board of Directors;
 - e. Make a financial report at the annual meeting or when requested by the President;
 - f. Recommend to the Board of Directors, when appropriate, new or revised financial policies;
 - g. Recommend to the Board of Directors, for approval prior to an annual meeting, a budget for the next calendar year;
 - h. Ensure the chapter has an Electronic Funds Transfer account established with National MOAA;
 - i. Perform other duties as are necessarily incident to the office of the Treasurer, such as:
 - (1) File the chapter's annual federal income tax return;
 - (2) Provide a financial report at monthly Chapter Board meetings;
 - (3) Provide financial records for periodic audits;
 - (4) Maintain historical files relative to the Treasurer responsibilities;
 - (5) File annual Arizona Corporation Commission registration update;
 - (6) Send dues reminder to each member during first week of January each year;
 - (7) Provide periodic dues status updates to the Membership Committee Chairman to identify those members who are delinquent;
 - (8) Perform follows-ups with delinquent members to request they renew their dues; and
 - (9) Perform other duties the President might assign.

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4. Secretary. The Secretary's responsibilities are:
- a. Provide members with timely written notification of all annual, regular, and special chapter meetings, generally by means of a chapter newsletter (Typically, it is not advisable for the Secretary to also serve as editor of the chapter newsletter.);
 - b. Maintain a record of all proceedings at chapter and board meetings;
 - c. Provide board members with timely written notification of all meetings of the Board of Directors;
 - d. Process membership applications;
 - e. Prepare required correspondence;
 - f. Maintain a chapter's correspondence files;
 - g. Prepare reports and returns;
 - h. Maintain and safeguard all important records and legal documents and ensure they are passed on to a successor;
 - i. Ensure updated chapter officer information is furnished to the Council and Chapter Affairs Department as soon as possible following leadership changes by submitting a Council/Chapter Officer Form. (See appropriate Council and Chapter Policy and Procedure Guide Appendix.);
 - j. Maintain and safeguard valuable equipment (such as U.S. and chapter flags) belonging to the chapter;
 - k. Perform other duties that are commensurate with the office or as might be assigned by the Board of Directors or the President; such as:
 - (1) Send draft/final minutes of monthly meetings to the Board of Directors/all members;
 - (2) Check the chapter's mailbox weekly;
 - (3) Handle all administrative tasks at meetings (sign-ins, name tags, etc.); and
 - (4) Manage split-the-pot and door-prize drawings at monthly meetings.

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5. Directors. (Note: There are no specific responsibilities identified in the 2015 Council and Chapter Policies and Procedures Guide for Directors.) The Directors' responsibilities are:

- a. Attend board meetings and serve as a voting member of the Board of Directors;
- b. Provide input to the President on issues of chapter management, finances, programs and special matters, etc.;
- c. Establish and review chapter bylaws, policies, procedures and operating instructions annually and other guiding documents and make recommendations for revision as needed;
- d. Serve as a greeter at chapter functions; and
- e. Perform other duties the President might assign.

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6. Immediate Past President. (Note: There are no specific responsibilities identified in the 2015 Council and Chapter Policies and Procedures Guide for the Immediate Past President.) The Immediate Past President's responsibilities are:

- a. *Serve as mentor to the President;*
- b. *Serve as voting member of Board of Directors;*
- c. *Serve as chairman for standing/ad hoc committees as needed by the President;*
- d. *Serve as a greeter at chapter functions; and*
- e. *Perform other duties the President might assign.*

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7. Transition Liaison/Professional Networking Representative. The Transition Liaison/Professional Networking Representative's responsibilities are:

- a. Provide transition assistance to servicemembers;
- b. Serve as primary point of contact in the chapter for MOAA members and their spouses who are in the process of relocating to the chapter's geographic area;
- c. Share all job opportunities with his or her state council's Transition Coordinator and national MOAA;
- d. Perform other duties as are necessarily incident to the office of the Transition Liaison, such as:
 - (1) Serve as chapter point of contact for the AZCOC Transition Coordinator;
 - (2) Forward information received from the AZCOC Transition Coordinator deemed appropriate for dissemination to chapter members;
 - (3) Provide articles for chapter newsletter on transition news and issues;
 - (4) Provide input to the President for the Semiannual Report to the AZCOC; and
 - (5) Perform other duties the President might assign.

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8. Surviving Spouse Liaison. (Note: This position is a LOE Award Requirement.) The Surviving Spouse Liaison's responsibilities are:

- a. *Serve as primary point of contact on legislative and benefits-information issues concerning surviving spouses;*
- b. *Work directly with national MOAA's Surviving Spouse Advisory Committee (SSAC);*
- c. Perform other duties as are necessarily incident to the office of the Surviving Spouse Liaison, such as:
 - (1) *Serve as liaison/central point of contact for Surviving Spouse Members with national MOAA, AZCOC and other applicable organizations;*
 - (2) *Assist the President with all Surviving Spouse matters;*
 - (3) *Coordinate activities among Surviving Spouse members and provide leadership;*
 - (4) *Research and respond to inquiries from Surviving Spouse Members regarding their interests or concerns;*
 - (5) *Provide articles for chapter newsletter on Surviving Spouse Member matters;*
 - (6) *Assist the Membership Chair with recruiting Surviving Spouse Members;*
 - (7) *Mail letters/cards to Surviving Spouse Members without email access to inform them of upcoming Surviving Spouse related chapter events and encourage their participation;*
 - (8) *Contact Surviving Spouse members with information received from SSAC and the national MOAA Legislative Chair;*
 - (9) *Contact recently widowed spouses to provide information about MOAA Surviving Spouse membership and invite them to participate;*
 - (10) *Send sympathy cards to recent widows and get-well cards to Surviving Spouse Members recovering from surgery and/or illness;*
 - (11) *Solicit financial support from the chapter for Surviving Spouse Member projects;*
 - (12) *Provide input to the President for the Semiannual Report to the AZCOC; and*
 - (13) *Perform other duties the President might assign.*

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9. Legislative Committee Chairman. (Note: This position is a LOE Award Requirement.) The Legislative Committee Chairman's responsibilities are:

- a. Serve as a single point of contact to influence federal advocacy efforts in their congressional districts;
- b. Monitor local, state, and national legislative developments that might affect servicemembers, veterans, and retirees, and their families, or national security;
- c. Keep the chapter's board and members informed about legislative developments of particular interest;
- d. Recommend to the board, when appropriate, new or revised policies or objectives in the field of legislative affairs;
- e. Execute tasks related to advocacy that the Board of Directors specifically might direct or authorize;
- f. Liaise with other local organizations concerned with military, veteran, or retiree issues, with a view to obtaining their support for the achievement of the chapter's legislative objectives;
- g. Liaise with the legislative committee of the state council of chapters and with MOAA's Government Relations Department regarding state and national political offices on matters of vital interest affecting servicemembers, veterans, and retirees, and their families, or national security;
- h. Ascertain and disseminate to chapter members, but not the general public, the records and positions of candidates for local, state, and national political offices on matters vitally affecting service retirees or national security;
- i. As far as possible, establish and maintain good working relationships with local, state, and national legislators (and their key assistants) representing voters in a chapter area;
- j. Ensure committee monitoring of legislative developments at each of the three levels of government: local, state, and federal. For examples, see those provided in the 2015 MOAA Council and Chapter Policies and Procedures Guide;
- k. Recruit committee members who will work together smoothly and productively;
- l. **Submit a written narrative describing the level of effort and results of the Legislative Committee to the President to facilitate the chapter's LOE award submission;**
- m. Perform other duties as are necessarily incident to the office of the Legislative Liaison, such as:
 - (1) Provide articles for chapter newsletter on Legislative news and issues;
 - (2) Solicit supporting documents that may be useful in supporting legislation and providing that information in a timely fashion;
 - (3) Provide input to the President for the Semiannual Report to the AZCOC; and
 - (4) Perform other duties the President might assign.

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10. Membership Committee Chairman. (Note: This position is a LOE Award Requirement.) The Membership Committee Chairman's responsibilities are:

- a. *Oversee the committee's efforts to retain existing members and recruit new ones;*
- b. *Oversee the committee's efforts to establish goals, plan and carry out membership-solicitation drives, and follow up on leads concerning potential members;*
- c. *Recruit committee members who will work together smoothly and productively;*
- d. *Submit a written narrative describing the level of effort and results of the Membership Committee to the President to facilitate the chapter's LOE award submission;*
- e. Perform other duties as are necessarily incident to the office of the Membership Committee Chairman, such as:
 - (1) *Coordinate with the Committee Module Administrator regarding changes to the membership roster;*
 - (2) *Maintain the chapter's membership roster;*
 - (3) *Report pertinent membership information to National MOAA (deceased members, changed contact information, etc.) in a timely manner;*
 - (4) *Report new members to national MOAA via website;*
 - (5) *Aid new members with the national/chapter membership process as needed;*
 - (6) *Forward updated membership roster to chapter officers, directors, and committee chairmen whenever substantive changes are made;*
 - (7) *Provide requisite reports to the President and Board of Directors;*
 - (8) *Aid members with the national/chapter membership renewal process as needed;*
 - (9) *Develop a chapter recruiting brochure;*
 - (10) *Participate in local/regional events to recruit new members;*
 - (11) *Provide input to the President for the Semiannual Report to the AZCOC; and*
 - (12) *Perform other duties the President might assign.*

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11. Programs Committee Chairman. The Programs Committee Chairman's responsibilities are:

- a. *Oversee the committee's efforts to plan and execute a program of activities consistent with the purposes of the chapter and the desires of the membership;*
- b. *Have a speaker who is available on short notice in reserve in case a speaker cancels at the last moment;*
- c. *Recruit committee members who will work together smoothly and productively;*
- d. Perform other duties as are necessarily incident to the office of the Programs Committee Chairman, such as:
 - (1) *Develop programs, schedules, dates, locations, menus, etc. for chapter meetings;*
 - (2) *Coordinate audio/visual equipment to suit each program's requirements;*
 - (3) *Provide requisite reports to the President and Board of Directors;*
 - (4) *Send out meeting and activity reminders by e-mail to the membership (or by regular mail or phone calls to those who don't use e-mail);*
 - (5) *Plan and/or coordinate other chapter activities;*
 - (6) *Submit monthly meeting announcements to the local newspaper and chapter newsletter;*
 - (7) *Receive and record reservations for luncheons/dinners;*
 - (8) *Notify restaurant of monthly luncheon/dinner orders and attendee count;*
 - (9) *Assist with monthly meeting set-up and closure (e.g., flags, podium, etc.);*
 - (10) *Arrange for workshops and other special activities;*
 - (11) *Provide input to the President for the Semiannual Report to the AZCOC; and*
 - (12) *Perform other duties the President might assign.*

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12. Personal Affairs Committee Chairman/Officer. (Note: If a Personal Affairs Committee is not established within a chapter, designating a Personal Affairs Officer is strongly encouraged.) The Personal Affairs Committee Chairman/Officer's responsibilities are:

- a. *Serve as the primary point of contact for issues associated with military rights and entitlements, with special emphasis on survivor benefits information;*
- b. *When called upon, provide information to members and survivors about their entitlements;*
- c. *When called upon, help members and survivors in the submission of inquiries, applications, and claims to governmental agencies such as the VA, military personnel offices and finance centers, and Social Security offices;*
- d. *In a case of serious illness or death, express sympathy to the next-of-kin and offer assistance as needed;*
- e. *Keep members informed, generally by means of a chapter's newsletter, about facilities and services available in the area such as commissaries, exchanges, hospitals, dispensaries, and officers' clubs;*
- f. *Recruit committee members who will work together smoothly and productively; **
- g. *Submit a written narrative describing the level of effort and results of the Personal Affairs program to the President to facilitate the chapter's LOE award submission;*
- h. Perform other duties as are necessarily incident to the office of the Personal Affairs Committee Chairman, such as:
 - (1) *Ensure chapter members understand the scope and depth of personal affairs assistance and resources available to them;*
 - (2) *Keep the chapter informed of members that are seriously ill, pending surgery or prolonged treatment, or have passed (to include memorial service details);*
 - (3) *Update chapter members whenever there are changes to personal affairs assistance and resources;*
 - (4) *Maintain an up-to-date library of publications (e.g., MOAA, federal/state/local government, etc.) covering applicable member benefits and entitlements;*
 - (5) *Provide input to the President for the Semiannual Report to the AZCOC; and*
 - (6) *Perform other duties the President might assign.*

* Applicable only if the chapter has a Personal Affairs Committee.

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13. Public Relations Liaison. (Note: There are no specific responsibilities identified in the 2015 Council and Chapter Policies and Procedures Guide for the Public Relations Liaison.) The Public Relations Liaison's responsibilities are:

- a. Provide general information to local media outlets regarding chapter meeting dates, time, location, contact/RSVP information;
- b. Provide specific information to local media outlets that will help promote upcoming chapter events (e.g., fundraisers, membership drives, etc.);
- c. Provide information to local media outlets on the outcome of newsworthy chapter activities (e.g., veteran support projects, community service, scholarship award winners, etc.);
- d. Develop list of local community organizations that the chapter wishes to support along with their up-to-date contact information;
- e. Provide periodic contact with supported local community organizations as needed;
- f. Ensure all chapter activities are documented through photographs (and video when appropriate) and share the most representative/inclusive photographs with the newsletter editor;
- g. Support local community organizations with mutual programs of interest; and
- h. Perform other duties the President might assign.

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14. Newsletter Editor. (Note: There are no specific responsibilities identified in the 2015 Council and Chapter Policies and Procedures Guide for the Newsletter Editor.) The Newsletter Editor's responsibilities are:

- a. Solicit newsletter input from chapter officers, program chairs, liaisons, the Chapter Historian, members, etc.;
- b. Provide a forum for items of interest for members who miss the meetings;
- c. Manage the newsletter's format and layout;
- d. Provide a forum to introduce new chapter members and chapter meeting guests;
- e. Solicit the most current contact information from the Committee Module Administrator each month in preparation for newsletter distribution;
- f. Review local community calendar for items of interest for inclusion in the newsletter;
- g. Distribute PDF copies of the newsletter to those members with email accounts;
- h. Coordinate printing and distribution of hardcopy chapter newsletters; and
- i. Perform other duties the President might assign.

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Note: *Green Text* = 2015 Council and Chapter Policies and Procedures Guide responsibilities, *Red Text* = Level of Excellence (LOE) related responsibilities, and *Blue Text* = AZ Chapters' consolidated input.

15. Webmaster. (Note: There are no specific responsibilities identified in the 2015 Council and Chapter Policies and Procedures Guide for the Web Master.) The Web Master's responsibilities are:

- a. Review the Council and Chapter Communications section of the MOAA website for information regarding establishing, improving, and promoting a chapter website;
- b. Keep the chapter's website up-to-date;
- c. Keep chapter members informed of chapter website address and content therein;
- d. Solicit and coordinate input from chapter members; and
- e. Perform other duties the President might assign.

Chapter Position Responsibilities Guide – Ver 05

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16. Committee Module (CM) Administrator. (Note: There are no specific responsibilities identified in the 2015 Council and Chapter Policies and Procedures Guide for the CM Administrator.) The CM Administrator's responsibilities are:

- a. Periodically verify national MOAA membership status of chapter members;
- b. Confirm chapter officers are national MOAA members or the spouse of a national MOAA member in good standing;
- c. Perform a comprehensive CM review/update between 1 January and 31 March each year;
- d. Ensure timely CM update of chapter officer positions following elections and related occurrences;
- e. Ensure the CM properly reflects those individuals designated as Legislative Chair, Membership Chair, and Surviving Spouse Liaison;
- f. Perform other duties as are necessarily incident to the office of the CM Administrator, such as:
 - (1) Ensure CM access and use is in accordance with the Council and Chapter CM 2.0 Instructions;
 - (2) Obtain login credentials from MOAA;
 - (3) Periodically verify the accuracy of Member Records and Officer Positions and that no duplicate membership records exist;
 - (4) Coordinate with the Membership Chairman regarding changes to the membership roster;
 - (5) Add new chapter members to the CM;
 - (6) Add start and/or end dates for chapter officer and committee positions;
 - (7) Ensure satellite members are reflected in host chapter CM, if applicable;
 - (8) Review monthly Near Real Time (NRT) potential member recruitment lists;
 - (9) Master the ability to sort, export, print, and email CM records;
 - (10) Ensure all CM data and records are maintained in a secure manner, password-protected, and accessible only by authorized chapter leaders;
 - (11) Contact MOAA Member Service Center (MSC) at 800-234-6622 or MSC@moaa.org regarding CM related questions or recommendations; and
 - (12) Perform other duties the President might assign.

* The CM provides chapter leaders access to national MOAA's database in order to view, change, export, and update member and officer roster information. National MOAA only provides chapter presidents and membership committee chairmen CM access by default, however, designated chapter leaders can be given access in lieu of the president or membership committee chairman if requested.

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17. Chaplain. (Note: There are no specific responsibilities identified in the 2015 Council and Chapter Policies and Procedures Guide for the Chaplain.) The Chaplain's responsibilities are:

- a. Provide invocations, benedictions and other prayers as appropriate when requested at chapter meetings and events;
- b. Keep the President informed as to the ways and extent the chapter can assist with requests the Chaplain receives from members in need;
- c. Assist the Personal Affairs Officer—if requested—in expressing sympathy to the next-of-kin and offer assistance as needed in cases of serious illness or death; and
- d. Perform other duties the President might assign.

Chapter Position Responsibilities Guide – Ver 05

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18. Reserve Officer Training Corps (ROTC)/Junior ROTC (JROTC) Liaison. (Note: There are no specific responsibilities identified in the 2015 Council and Chapter Policies and Procedures Guide for the ROTC/JROTC Liaison.) The ROTC/JROTC Liaison's responsibilities are:

a. **Submit a written narrative describing the level of effort and results of chapter ROTC/JROTC support to the President to facilitate the chapter's LOE award submission;**

b. Perform other duties as are necessarily incident to the office of the Scholarship Committee Chairman, such as:

(1) **Develop list of area schools who offer JROTC and ROTC Programs with contact information including commanders' names, emails, phone numbers, etc.;**

(2) **Contact each ROTC/JROTC school in your respective area and inform them of MOAA and its programs to recognize outstanding cadets, to include presenting medals, certificates, Gold Bars, etc.;**

(3) **Order MOAA Award Sets (medals) from MOAA by 1 February of each year;**

(4) **Contact POC for each school to request name of respective awardees and awards ceremony details;**

(5) **Coordinate MOAA presenters at school graduation ceremonies to present medals, etc. to cadets;**

(6) **Develop/maintain continuity folder/book with detailed program policies and procedures;**

(7) **Order Gold Bars from MOAA by 1 February of each year;**

(8) **Provide article on program for chapter newsletter;**

(9) **Order supplemental items as required (e.g., certificates, flags, etc.);**

(10) **Brief program details and results during monthly chapter meeting;**

(11) **Offer/solicit/coordinate MOAA guest speakers for ROTC/JROTC classes;**

(12) **Provide input to the President for the Semiannual Report to the AZCOC; and**

(13) **Perform other duties the President might assign.**

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19. Fundraising Committee Chairman. (Note: There are no specific responsibilities identified in the 2015 Council and Chapter Policies and Procedures Guide for the Fundraising Committee Chairman.) The Fundraising Committee Chairman's responsibilities are:

a. **Submit a written narrative describing the level of effort and results of The Fundraising Committee to the President to facilitate the chapter's LOE award submission;**

b. Perform other duties as are necessarily incident to the office of the Scholarship Committee Chairman, such as:

- (1) *Oversee fundraising efforts specific to the chapter's general fund (vice scholarship fund);*
- (2) *Coordinate with the President and the Board of Directors to determine fundraising needs (e.g., chapter social events, membership recruiting events, community service efforts, etc.);*
- (3) *Develop a fundraising plan relative to the determined need and present it to the President and the Board of Directors for review and approval;*
- (4) *Work with the treasurer to setup up and maintain a general fundraising account;*
- (5) *Recruit committee members who will work together smoothly and productively;*
- (6) *Provide input to the President for the Semiannual Report to the AZCOC; and*
- (7) *Perform other duties the President might assign.*

Chapter Position Responsibilities Guide – Ver 05

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20. Scholarship Committee Chairman. (Note: There are no specific responsibilities identified in the 2015 Council and Chapter Policies and Procedures Guide for the Scholarship Committee Chairman.) The Scholarship Committee Chairman's responsibilities are:

a. **Submit a written narrative describing the level of effort and results of the Scholarship Committee to the President to facilitate the chapter's LOE award submission;**

b. Perform other duties as are necessarily incident to the office of the Scholarship Committee Chairman, such as:

- (1) Develop scholarship application form, including criteria and cover letter;
- (2) Develop list of applicable local schools with names of guidance counselors;
- (3) Participate in monthly member meetings to explain scholarship program status and request donations;
- (4) Work closely with the ROTC/JROTC Liaison to ensure supported ROTC/JROTC units are aware of applicable chapter scholarship opportunities;
- (5) Lead the Scholarship Committee efforts in reviewing applications and determining winners;
- (6) Coordinate with Treasurer to determine funds available for scholarships;
- (7) Act as focal point for applicant questions;
- (8) Develop and maintain continuity folder/book with detailed program policies and procedures;
- (9) Provide the status of selection process and the name of the eventual awardees to the Board of Directors and newsletter editor;
- (10) Oversee fundraising efforts specific to the chapter's scholarship fund (vice general fund);
- (11) Explore cooperative corporate/foundation fundraising opportunities;
- (12) Announce and award scholarships to winners at meeting;
- (13) Invite winners and family member(s) to scholarship award luncheon/dinner;
- (14) Work with the treasurer to setup up and maintain a scholarship fundraising account;
- (15) Recruit committee members who will work together smoothly and productively;
- (16) Provide input to the President for the Semiannual Report to the AZCOC; and
- (17) Perform other duties the President might assign.

Chapter Position Responsibilities Guide – Ver 05

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21. Employer Support of the Guard and Reserve (ESGR) Liaison. (Note: There are no specific responsibilities identified in the 2015 Council and Chapter Policies and Procedures Guide for the ESGR Liaison.) The ESGR Liaison's responsibilities are:

- a. Familiarize yourself with ESGR at <http://www.esgr.mil/az>;
- b. Participate in activities that both educate and recognize employers who are supportive of veterans, Guardsmen, and Reservists;
- c. Coordinate with prospective employers by offering opportunities to participate in job fairs;
- d. Facilitate, coordinate, and schedule ESGR provided Uniformed Services Employment and Reemployment Rights Act (USERRA) training to employers on employment and reemployment rights of veterans, Guardsmen, and Reservists;
- e. Assist those veterans, Guardsmen, and Reservists having difficulty regaining reemployment complete and submit a USERRA complaint for mediation. Note: Legal questions should be addressed by an ESGR Ombudsman or an individual that has undergone specific training;
- f. Coordinate with ESGR to schedule joint awards meeting;
- g. Assist ESGR obtain a Statement of Support from employers who agree to hire veterans and support Guardsmen and Reservists;
- h. Encourage MOAA member business leaders to sign a Statement of Support;
- i. Promote ESGR award presentations and Statement of Support signing ceremonies at MOAA meetings;
- j. Incorporate the importance of ESGR in chapter communications;
- k. Act as liaison for any support MOAA can provide to ESGR as regards employees or employers;
- l. Develop chapter ESGR program & coordinate with ESGR state representatives;
- m. Assist ESGR state representatives recruit local ESGR partners;
- n. Provide input to the President for the Semiannual Report to the AZCOC; and
- o. Perform other duties the President might assign.

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22. Chapter Historian. (Note: There are no specific responsibilities identified in the 2015 Council and Chapter Policies and Procedures Guide for the Chapter Historian.) The Chapter Historian's responsibilities are:

- a. Assist with the preservation of the chapter's key documents and historical records;
- b. Maintain a file of chapter officers, activities, and programs;
- c. Submit articles periodically for the chapter newsletter about chapter history;
- d. Assist the President with the preparation of the LOE award submission;
- e. Submit noteworthy items to AZCOC to support their efforts to promote AZ chapters; and
- f. Perform other duties the President might assign.

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23. Parliamentarian. (Note: There are no specific responsibilities identified in the 2015 Council and Chapter Policies and Procedures Guide for the Parliamentarian.) The Parliamentarian's responsibilities are:

- a. Ensure proper meeting rules are followed;
- b. Advise the President, Members, Committees, and the Board of Directors on matters of parliamentary procedure as requested;
- c. Maintain a copy of "*Robert's Rules of Order, Newly Revised*" and have it present along with a copy of the chapter bylaws whenever official chapter business is to be conducted;
- d. Inform the President of parliamentary procedure errors that affect members' basic rights; and
- e. Perform other duties the President might assign.