APPENDIX 1: Elected Officers - Roles and Responsibilities

A. Alumni Association President

The Alumni Association President will be the official spokesperson of the Alumni Association, under the direction of the Alumni Association’s Board of Trustees. She will lead and organize the day-to-day operations of the Association. She will maintain communications between Omega Delta Phi, Inc., their faculty advisor(s). In addition, working with the Clarkson University and Potsdam University ODP Alumni Representatives, she will represent the Alumni Association at both institutions.

Goals

The President is the point person to connect alumnae and potential alumna to the Alumni Association. She will maintain an open line of communication with members to ensure that the wants and needs of the members are being met and that Alumni events, expenditures, and activities are supported and executed. She will serve as a role model for Omega Delta Phi, Inc. sisters.

Responsibilities / Tasks

- Represents the Alumni Association on all occasions unless an alternate representative is designated.
- Serve as a member of the Board of Trustees.
- Note opportunities for participation in Potsdam community activities and in the communities where alumni reside.
- Designate, in association with other elected officers, individuals to hold appointed positions (non-elected) as stated in the constitution.
- Appoint chairs, members of committees, as designated in the constitution.
- Prepare the agenda for Annual Membership meetings, working in conjunction with the Board of Trustees.
- Plan and preside over Association meetings in an organized manner, being mindful of timeframes and agenda items.
- Monitor the fiduciary and programmatic activities of the Chief Financial Officer and Finance Committee members.
- Review all financial documents, including operating budgets, with the Chief Financial Officer and Finance Committee documents before presenting them to the Board of Trustees for approval.
- Sign official documents and financial contracts, approved by the Board of Trustee, in behalf of the Alumni Association.
- Initiate correspondence on behalf of the Alumni Association.
- Present to the Board of Trustees the names of any elected officer who fails to perform the duties of her position.
- Recommend to the Board of Trustees the removal of any appointed officer, committee chair or committee member who fails to perform the duties of her position.
- Represent the Alumni Association and participate in Greek / Pan-Hellenic Councils at both Universities, working with the Clarkson University and the Potsdam University ODP Alumni Representatives.
- Serve as an ex officio member on all committees except those related to Nominations and Elections.
- Present to the Board of Trustees, quarterly and prior to the annual meeting, a “President’s Report” which will include information regarding Alumni Association programs, financial operations and budget, membership/retention status reports and any other information requested by the Board.
- Oversee the transfer of all officers, committee reports, and other documents to Officers and Committee Chairs.

Completion of Position

Serve as Immediate Past President for the duration of her successor’s term to provide for continuity for the organization. Review position with the new President and provide a written note to successor and any other materials developed during your tenure as President, including a uniform President’s handbook with guidelines, ideas, and suggestions for future President. In addition, the President will transfer all documents, memorabilia, and photos/videos/written account to the new president.
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B. **First Vice President**

The First Vice President will perform all duties of the President in absence of, or at the request of the president. She will serve as an advisor to the President; lead the Events Committee; make recommendations of activities, projects and programs that are commensurate with the aims, purpose and resources of the Alumni Association.

**Goals**
The role of First Vice President is to insure continuity in the absence of the President. She will lead the social activities of the organization, selecting and working with all Social Event Directors. Working with the Vice President – Development/ Fundraising she will work with Fundraising Event Directors as needed.

**Responsibilities**
- Perform all of the duties of the President in the absence of, or at the request of the president.
- Serves as the Association’s Parliamentarian; advises, upon request the president, other officers, committees, and members, on matters of parliamentary procedures according to Association’s Constitution and Bylaws, and Robert’s Rules of Order, Newly Revised.
- Lead the Events Committee that is responsible for all Social and Community Service events of the Alumni Association.
- Work with the Vice President of Development/Fundraising to plan social, community service and fundraising events that are commensurate with the aims, purpose and resources of the Alumni Association.
- Create opportunities for members to participate in events and activities.
- Ensure that there is a balance of activities provided to meet members’ needs and wants.
- Prepare and submit to the Finance Committee and Chief Financial Officer for approval, an annual and per event budget.
- Recruit / designate Social Event Directors for each event. The Social Event Director will lead the operation of the event, reporting to the First Vice President. In the absence of a Social Event Director, the First Vice President will be responsible for the event and will assemble a team from the general membership.
- Determine if multiple Social Event Directors are required for a specific event, due to size, complexity, or need to represent multiple generation of alumni.
- Monitor event spending in accordance with approved event budgets.
- Prepare event proposals, plans and timelines to the officers for approval by the officers. The Board of Trustees will review / approve the activities planned for the annual meeting.
- Present, plan, execute Alumni Association events, and increase membership participation. Present results to the membership, officers and/or Board of Trustees.

**Completion of Position**
Review position with the new First Vice President and provide a written note to successor and any other materials developed during your tenure as First Vice President, including a uniform 1st Vice President’s handbook with guidelines, ideas, and suggestions for future First Vice Presidents. In addition, the First Vice President will transfer all documents, memorabilia, and photos/videos/written account to the new First Vice President.
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C. **Vice President – Development and Fundraising**

The Vice President, Development / Fundraising, serves as a key leadership team member and as an active participant in making strategic decisions affecting the operation of the Omega Delta Phi Sorority Alumni Association. In partnership with the Board or Trustees and President, this position is responsible for all Association’s development and fundraising activities of the Association.

**Goals**

The Vice President, Development / Fundraising will forge relationships and develop programs to build the Association’s visibility, impact and financial resources, recognizing that development activities goes beyond raising financial resources but also includes the Association’s visibility and impact.

**Responsibilities / Tasks**

- Leads all Fundraising Committees
- Design and implement the infrastructure needed to grow the Alumni Association budget through the solicitation of individual gifts, major gifts, and special events.
- Oversees all fundraising events, working with Fundraising Event Directors.
- Work closely with the Chief Financial Officer, Vice President Membership Recruitment / Retention, Social Networking Manager, and Database Manager in order to fulfill the goals of this position.
- Work to expand and diversify our donor base/pipeline and work closely with other team members to secure funding for new initiatives or fundraising efforts.
- Define fundraising initiatives for scholarships, alumni awards, and building funds.
- Work closely with the Trustees and other teams to secure funding of new initiatives, encouraging their active participation.
- Collaborate with the Chief Financial Officer and Finance Committee to develop and implement an Association financial strategy.
- Work with the Database Manager to record donor information and to extract donor analysis information.
- Record and monitor all donor information. Provide and present statistical analysis to the Board of Trustees and senior leaders, e.g. average donation, donor demographics, etc.
- Identify, develop and mentor a Development team Fundraising Event Managers.
- Create and/or maintain a uniform Development handbook including guidelines, ideas, and suggestions for future Development leaders.
- Prepare a Year End Summary of Development/Fundraising activity; present it at the Annual Alumni meeting and published it thereafter for the entire membership.
- Vice President – Development / Fundraising shall assume all of the duties of the President upon the absence, resignation or disqualification of the President, Vice President and Vice President – Membership Recruitment and Retention.

**Completion of Position**

Review position responsibilities with the new Vice President, Development / Fundraising. Provide a written note to successor and any other materials developed during their tenure, including a uniform Development / Fundraising handbook with guidelines, ideas, and suggestions for future Vice President, Developments. In addition, the Vice President, Development / Fundraising will transfer all documents, records and written accounts to the new Vice President, Development.
APPENDIX 1: Elected Officers - Roles and Responsibilities

D. **Vice President – Membership and Recruitment**

Alumni Association membership recruitment and retention is the most important activity for the ODP Alumni Association. Membership recruitment and retention is the way we perpetuate the ideals of the Sorority and ensures the Association’s future success. Without alumni members, there will be no Omega Delta Phi Alumni Association. This position is responsible for Alumni Association’s membership proactive recruitment and retention programs. Every member is responsible for making Alumni membership recruitment a success, but the position of Vice President of Membership Recruitment & Retention is accountable for organizing, monitoring and leading these efforts, and making sure programs/activities are in place to increase membership retention rates.

**Goals**
To identify and recruit Alumni Association members, improve alumni membership retention, reduce member disengagements, and to recognize that the varied profiles and demographics of the alumni membership to assure programs satisfy these differences and interests.

**Responsibilities / Tasks**
- Lead the Membership and Recruitment Standing Committee.
- Establish a formal recruiting and retention strategy and set realistic annual active membership goals. Publish goals and report to this metric to the membership semi-annually.
- Examine program strengths and weakness, barriers and opportunities, collect data on recruitment outcomes and retention statistics.
- Report quarterly to the Board of Trustees on current and planned membership recruitment and retention programs.
- Report semi-annually to the membership on current and planned membership recruitment and retention programs.
- Recognize that effective recruiting and retention requires continual aggressive action and a collective, Association-wide effort.
- Establish an annual recruitment and retention program-operating budget.
- Work with the Web Manager and Social Networking to insure that the Alumni Association maintains an appealing, functional and substantive webpage, including current news, Alumni achievements, upcoming events, membership inquiries, online applications.
- Maintain Alumni contacts and develop long-term membership relationships.
- Monitor attrition and lack of participation.
- Monitor dues payment trends.
- Respond rapidly & personally to membership inquiries. Immediately follow up all inquiries.
- Provide to the Database Manager, in a timely manner, collected membership information.
- Target Sorority past officers to be involved in recruitment networking activities.
- To coordinate and share the Alumni Association’s membership information with both University’s Alumni Offices.
- To augment the Alumni Association’s membership information with information obtained from both University’s Alumni Offices.
- Investigate membership and/or officer resignations to mitigate avoidable problems or concerns.
- Utilize the membership databases, and send personal invitation to non-member alumni.
- Establish effective alumni recruitment networks; engage alumni and current students as recruiters.
- Send Welcome Packets to all new Association members including member datasheets, the constitution, list of officers etc. She will request website access and access to any related social networks.

**Completion of Position**
Review the position activities with the new Vice President – Membership Recruitment and Retention within 30 dates of their election or appointment. Provide a written turnover report to successor, including the status for current or planned programs as well as any other materials developed during your tenure. In addition, the Vice President – Membership Recruitment and Retention will transfer all documents, membership information and related media to their successor within 30 days of their election or appointment.
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E. **Secretary/Board of Trustees Administrative Director**

In addition to the President of the Association, this role serves as a liaison and administrative lead for the Board of Trustees in addition to duties as the Secretary of the Association. This position plays a dual role in performing duties of the Association’s Secretary but also functioning as the Administrative Director for the Board of Trustees. She will interact with both the officers of the Association and Members of the Board of Trustees.

**Goals**

Insure for consistency and transparency related to proceedings and correspondence of the Association.

Provide a primary point person for the Board of Trustees and provide a mechanism for oversight for the Association’s operations.

**Responsibilities / Tasks**

- Act as the Administrative Director of the Board of Trustees.
- Organize, lead and convene meetings of the Board of Trustees.
- Accept fiduciary responsibility to convene the Board of Trustees when she feels a significant decision or pending action requires oversight and/or direction from the Board of Trustees.
- Receive requests from the membership regarding plans, issues or actions to be brought to the Board of Trustees. Present these requests to the Board of Trustees for their determination if they should be acted upon.
- Serve as a non-voting member of the Board of Trustees except in the occasion of a tied vote among Board members. In that situation, she will be responsible to cast the deciding vote.
- Keep minutes of meetings of the Association and Board of Trustees.
- Submit minutes for electronic distribution and/or social media updating.
- Handle Association correspondence as required.
- Solicit ‘Call for Nomination’ requests in accordance with the Constitution.
- She will work with the Database Manager and Vice President Membership and Retention to insure that membership contact information is current.
- Work with the Vice President - Membership and Retention, and Vice President - Development and Fundraising to craft and review communications being distributed in the name of the Association.

**Completion of Position**

Review the position with the new Secretary / Administrative Director of the Board of Trustees and provide a written note to successor and any other materials developed during her tenure, including a uniform Secretary / Administrative Director of the Board of Trustees handbook with guidelines, ideas, and suggestions for future Secretary / Administrative Director of the Board of Trustees. In addition, the Secretary / Administrative Director of the Board of Trustees will transfer all documents, memorabilia, and photos/videos/written account to the new Secretary / Administrative Director of the Board of Trustees.
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F. **Chief Financial Officer**

The Chief Financial Officer is responsible for the financial security of the Alumni Association. When it comes to finances, the Association is truly a business. Using business procedures in the Association’s financial operations will allow the Association to prosper and utilize its funds for the good of the Alumni, the Sorority, the Universities and the local communities. The Chief Financial Officer, working with a Finance Committee, will spearhead these activities.

This position will take the lead in safeguarding the Association’s assets, data and personal information. The Chief Financial Officer has the fiduciary responsibility for the financial security and integrity of the Alumni Association. The Chief Financial Officer is influential in proper financial management of the Association and thus greatly affects the public’s perception, trust, and assurance in the organization management. This accountability is also shared with the Board of Trustees of the Association, but it is executed by the Chief Financial Officer and the Finance Committee.

**Requirements:**

- Integrity, respect and communication skills (verbal and written)
- Basic math and time management skills
- Personal commitment to devote the time necessary to perform the responsibilities of the Chief Financial Officer.
- Understanding of, or willingness to learn, the financial accounting techniques for nonprofit organizations.

**Responsibilities / Tasks**

- Serve on the Board of Trustees.
- Oversee the management of all financial records and accounts.
- Manage the payment of all expenses incurred by the Association.
- Divide responsibility for the receipt and reconciliation of fundraising contributions. These should be handled by a member of the Finance committee and reconciled by the Chief Financial Officer.
- Serve as a signer on all Association accounts; co-sign all checks over $5000 along with Alumni Association President.
- Manage any governmental filings, and regulatory requirements for permits or licenses.
- Use automated accounting software to manage the Alumni Association’s financial affairs.
- Send membership dues invoices and track payments and donations.
- Present quarterly financial reports, including Balance Sheet and Profit/Loss Statement, to the Board of Trustees with budget comparative, and on an ad hoc basis as requested.
- Document unexplained variances between budgeted and actual line items of expense or revenue to facilitate future budgeting processes.
- Work with President and other officers to prepare annual budget to be approved by the Board of Trustees.
- Confirm that all contributions are confirmed and a thank you letter is sent.
- Confirm that all volunteer time is tracked to reflect the value of volunteers in budgets and grant proposals.
- Recommend changes to fee structure and budgetary line items as needed.
- Approve all non-budgeted expenditures.
- Serve as Finance Committee Chair.
- Review Annual Financial Statements and Budget.
- Review existing and new investments on a quarterly basis and allocate excess money accordingly each year.
- Research fundraising opportunities with the Vice President – Development / Fundraising.
- Review / investigate other support materials for chapter fundraising purposes.
- Review, revise and recommend new policies that will improve the Association’s financial management, accounting systems and reporting, and overall financial growth.
- Create and maintain Chief Financial Officer’s Manual and recruit the next Chief Financial Officer.
- Assist in the completion and submission of a Year End Summary to be documented and presented at the Annual Alumni meeting and published thereafter for the entire membership.
Chief Financial Officer (continued)
Completion of Position
Arrange for the transition to a new Chief Financial Officer. Complete paperwork for authorization of new signature. Share passwords for online banking. Review position with the new Chief Financial Officer and provide a written note to successor and any other materials developed during your tenure as Chief Financial Officer, including a Chief Financial Officer handbook with guidelines, ideas, and suggestions for future Chief Financial Officer. In addition, the Chief Financial Officer will transfer all documents, memorabilia, and photos/videos/written account to the new historian.
G. **Legacy Representative**
A representative from each decade will be part of the Board of Trustees. The decade can be determined by either the Pledge Class Year or Year of Graduation, but the intent is to include expertise, experience and opinions of alumni from past eras.