

SECRETARY/TREASURER'S RESPONSIBILITIES

When the President, Vice President & Secretary/Treasurer fulfills **all responsibilities** throughout their term, they will receive compensation for their fees. The compensation fees are to cover minor out-of-pocket expenses such as postage and phone calls. Service on the Leadership Team is a minimum six-month commitment beginning on April 1st or October 1st of each year. The term is renewable once in succession for this position if approved by the **Director**. **Each member of the Leadership Team must have one or more months in remaining fees in order to accept the position.**

In order to be on the Leadership Team, the Secretary/Treasurer must read and sign the Leadership Team Agreement BEFORE taking over the position and having his or her fees compensated. Each member of the Leadership Team **must attend** Leadership Training held in March and September of each year. **Leadership training is REQUIRED.** **The Leadership Team must meet every month to evaluate the chapter.**

The Secretary/Treasurer is responsible for a number of activities, including the following:

1. In the absence of the chapter President and Vice President, **running each meeting of that chapter according to the BNI Agenda and Policies.**
2. **Maintaining the chapter's speaker schedule** and reports on the scheduled speakers six weeks in the future. He/She is to remind the speakers that they are to submit a current biographical sheet prior to their presentation and to bring a door prize on the day they are to speak. Only members bringing a visitor or referral are eligible for the door prize.
3. **Maintaining the Speaker Resource Table** and reminding the speakers a week in advance to utilize this resource during their presentation.
4. **Introducing the speaker(s)** each week. This includes brief information about each speaker's background and area of expertise (use an up-to-date Biography Sheet).
5. **Giving a brief report** each week (no more than two minutes) with information taken from BNIWMASS. The report will include:
 - a. Members whose fees will expire in 90 days
 - b. Members who still owes renewal fees
 - c. Members whose memberships have lapsed or been dropped (so the card box and members' card file holders can be updated)
 - d. The chapter's financial status at least monthly.
 - e. The visitor statement about the investment to join BNI (Refer to page for the verbatim statement to be used)
6. **If there are any questions** during the report regarding the amount or use of the fees, asking the visitor to see you after the meeting. If you or the chapter President cannot answer their questions, refer them to your BNI Director.
7. At the first meeting of the month, announcing all members whose fees will expire by the 1st day of the following month and begin collecting fees during the current month for those members. Have all fees COLLECTED by the last meeting of the **current** month from all members whose fees expire by the 1st day of the following month. **Membership Committees must approve renewal applications within 5 days of receipt.** Renewal forms and payments should be sent to

your BNI Regional Office as soon as the Membership Committee has approved the renewal.

8. Sending in renewal or new member payments received at any meeting during the month, with the top portion of applications and the applicant's business card, **to your BNI Regional Office no later than 24 hours after the meeting.**

9. With all approved new members applications, before mailing, **ensuring the following are completed and legible:**

- a. the chapter name is shown
- b. the application form is dated and signed
- c. the sponsor is shown
- d. the method of payment is marked in the appropriate column
- e. include one of their business cards
- f. verify the amount is the same on the application and check
- g. verify that a current application is being used with **current** membership rates

10. If members renew late, collect the mandatory late fee (\$20) plus the membership fee and forward the payments to the BNI Regional Office so the member may be reinstated in BNI. If the payment is made more than 15 days after the renewal date, the individual's membership may be terminated in which case the reinstatement fee is \$100.

11. If you will not be at a meeting, and any member's fees need to be collected, or members need to be advised that fees are coming up for renewal, **arrange with the chapter President** to collect the fees, or advise whose fees are coming up.

12. Ensuring that all **member contact details are kept up to date on BNIWMASS** and making necessary changes.

13. Printing out copies of the chapter roster sheet weekly from BNIWMASS and placing it on the sign-in registration table or distributing it.

14. Participate in the Leadership Team Meeting monthly. Hand a copy of the chapter's bank statements to both the President and Vice-President for review.

15. Assisting the chapter President as necessary.