



## **TOP 10 JOB ESSENTIALS: Secretary/Treasurer**

### **1. Be in touch with us *every week*, by e-mail, by mail, it doesn't matter – just be in touch!**

The essential role of the Secretary/Treasurer is to be the liaison between the BNI WMass Office and your chapter members. The only way we know of your members is through you. After each meeting send a quick e-mail to [Kathy@bniwmass.com](mailto:Kathy@bniwmass.com) or call 413-268-7680 to let us know if anything has changed, if a member has dropped or if a new member has applied. Send in the new or renewal applications and payment.

### **2. Announce those members who are due for renewals 8 weeks out.**

Each member gets at least a sixty-day notice of their renewal date. At each meeting, announce who is due for the next two months. After the meeting, give them their renewal application. Also announce any members who are past due.

### **3. Renewals are due to BNIWMass by the first of the renewing month. Make sure they're post-marked the 30<sup>th</sup>/31<sup>st</sup> so no one is late.**

We didn't invent the Late Fee Policy, but we are required to apply it. Let's make sure we don't have to. In order to eliminate late fees, members are welcome and encouraged to submit their renewals to their chapter S/T any time throughout the month prior and post-date their renewals to the first day of their renewing month.

### **4. Mail renewals and new member application with fees to us as soon as you get them.**

Then you know that we have the information and you don't have to be concerned about finding it later. You need to be in touch with us every week anyway, this is one of those times.

### **5. Include paperwork with everything you mail.**

Include the "Office Copy" of the New Member Application or the top "white" copy of the Renewals Application making sure that the Chapter name is listed or else we don't know which chapter a person has joined/renewed. Mail them immediately so that we will know the business category is no longer vacant. The mailing address is: **BNI—Western Mass, P.O. Box 613, Goshen MA 01032**

**6. Plan the Speaker rotation for only 6 weeks.**

Sometimes you'll be tempted to plan the Speaker Rotation for a few months. As soon as you do, guaranteed someone will need to change their date. Six weeks works beautifully, as you'll need to schedule your BNI Director's visit every six or so weeks and you'll want to schedule new members, as they become members. Remember that new members should not be scheduled until they attend a Member Success Program (MSP). Also, remind your speakers to bring a door prize. They will appreciate your reminder, especially if it is a few days before they are speaking.

**7. Meet with your LT every month and distribute a copy of the bank statement.**

You are part of the Leadership Team. Make sure that you participate monthly in the Leadership Team Meeting. Also, distribute a copy of the monthly bank statement of the chapter's finances so that everyone knows where they are. The meeting is the opportunity to iron out any challenges that you may be facing and offer input to chapter issues.

**8. If a member hasn't paid meeting room fees by mid-month, take it to the MC.**

You are not a collection agency. If a member hasn't made good on their meeting room fees by the 15<sup>th</sup> of the month, please let the Vice President know. It then becomes the Membership Committee's issue, not yours.

**9. Introduce your members as though they are the global experts in their field and you are the luckiest group alive to have them present to you.**

Your introduction of your fellow members sets the stage for their entire presentation. Give them the best warm-up act that you possibly can. Plan, prepare and introduce.

**10. HAVE FUN!**

Leaders set the meeting tone. Within the agenda there is plenty of room for fun and lightness. For example, when you are introducing the speaker, do it creatively and joyously. If you enjoy yourself, so will everybody else. If you need fun ideas, contact your Director - they are the BNI fun headquarters!