

New Chapter Officer Training Guide



PayrollOrg | Chapter Relations Department
ChapterRelations@payroll.org | (210) 226-4600

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Overview

Taking on the responsibilities of a chapter officer can be a daunting challenge. This guide is a general overview to help new officers and chapters understand the many components and roles of a successful chapter and how to transition those responsibilities to newly-elected officers. Many chapter boards have minimal guidance and lack succession planning or knowledge transfer when board members change.

The New Chapter Officer Guide is a supplement to the [Local Chapter Guide](#). The [Local Chapter Guide](#) is the main resource for chapters and should be reviewed by Chapter Officers and Board Members yearly. For assistance from PayrollOrg (PAYO) and other chapter leaders, tweet a question using #PAYOChapters or email chapterrelations@payroll.org.

Organization

The organization of a chapter is one of its most vital considerations. Whether starting a new chapter or transferring knowledge to newly-elected officers, it is important to understand the standard chapter structure and the components that ensure its success. Standard chapter organization should include:

- ◆ By-laws
 - These specify how the board will operate and configures the officers.
 - New chapters should draft by-laws and get board approval. Example by-laws can be found in the [Local Chapter Guide](#).
 - Transition tip #1 – New officers should be expected to read and understand the chapter’s by-laws. Consider asking each new officer to initial that they have read and understand the by-laws.
 - Transition tip #2 – The chapter board should check annually to ensure its by-laws adhere to PAYO National guidelines outlined in the [Local Chapter Guide](#).
- ◆ Transition of duties
 - Clear instructions for new and transitioning officers make a big difference in the successful operation of your chapter long term.
 - Write clear standard operating procedures for each board and staff position to define each person’s role and assist with new officer training and knowledge transfer.
- ◆ Elections
 - The structure of your chapter’s elections should be outlined in your by-laws.
 - Typically elections are held yearly.
- ◆ Chapter Officers/Board Members
 - Chapter Officers, Board Members, Directors, Coordinators/Committee members, and volunteers are referenced as they are outlined in your bylaws.
 - A minimum of three board members is typical.
 - Founding [board members](#) and Chapter Officers are very special. They usually know the founder/s of the organization and believe strongly in its cause.

- The board might be made up of those people who were interested in your [mission](#) early on, or it could be a group of individuals who worked together to get the organization started.
 - Either way, the founding board guides the nonprofit as it organizes as a nonprofit corporation and applies to the IRS for [tax-exempt](#) status. Being on a founding board is hard work, so members need to be willing to give considerable time and energy to the organization. Those first board members may have to do lot of the group's work and fund raise extensively.
 - Serving on a nonprofit board has serious fiduciary, legal, and ethical responsibilities.
 - Board Members/Chapter Officers can be held accountable for dereliction of duties.
 - Board Members/Chapter Officers are expected to help support the organization financially by helping to raise funds.
 - Board Members/Chapter Officers need to understand the difference between the responsibilities of the board, committee members, and volunteers.
 - The first Board Member/Chapter Officers should set up a nomination committee whose job will be to find new board members to both expand the board and to fill open positions as they arise.
 - A great founding board will not micromanage the board, committee members and volunteers, but concern itself with stabilizing the organization financially.
 - Use each board member's contacts to broaden the nonprofit's reach and influence.
- ◆ Typical Board Officer positions are listed below and descriptions can be found in the [Local Chapter Guide](#):
- President
 - Vice-President
 - Treasurer
 - Secretary
 - Government Liaison Officer
- ◆ Officer transition options
- Term limits
 - Consider staggering board terms
 - For instance, one could serve one year, one could serve two years. You'll want to specify in your articles of incorporation and by-laws what the maximum term is for board members going forward.
 - Staggering board terms ensures there is always fresh talent coming onto your board
 - Ask board members if they agree to staggered terms
 - Cycle changes
 - Secretary to Treasury; Treasury to Vice President; Vice-President to President
 - Define Succession Planning Annually
 - General transitions
 - Unknown transitions – death of officer/board member – should be considered and planned for. Typically, unknown transitions can be addressed by either special elections or by what is written in your chapter by-laws.

- ◆ Committees and their roles
 - A chapter will form a committee to complete a special project or assignment that requires more than one person.
 - Examples include:
 - National Payroll Week
 - Membership Committees
 - Volunteer Committee/Community Outreach
 - Education Committee, may include study groups
 - Chapter Contests
 - Speaker Committee
 - Communications Committee
 - Social Media Committee
- ◆ Application for Chapter Re-affiliation
 - Required annually by PAYO National.
 - The application and instructions for the Application for Chapter Re-affiliation is found in the PAYO's [Local Chapter Guide](#). This should be submitted annually when new chapter officers are elected.
 - As part of the annual re-affiliation process, all chapter leaders must verify they have read and understand PAYO's [Local Chapter Guide](#).
 - A chapter membership list is required to be included with the Application for Chapter Re-affiliation as part of the guidelines which started in 2015.
 - The chapter must aim to have 51% of its members be PAYO National members.
 - Any questions should be directed to PAYO National Chapter Relations office chapterrelations@payroll.org.

Document Retention

The document retention policy identifies the record retention responsibilities of board, committee members, volunteers, members, and directors for maintaining and documenting the storage and destruction of the organization's documents and records. Your chapter should have a document retention plan and secure location to store vital materials. Examples include:

- ◆ Electronic/cloud-based storage
 - Convenient but can lead to subscription costs
 - One Drive
 - Dropbox
- ◆ Hard-copy storage
 - Safety deposit box/storage facility
 - Be sure to purge annually

Finance

Local chapters need to have good financial information to understand the financial health of the chapter. It is particularly important to monitor cash flow to ensure the chapter has the necessary resources for running the chapter.

- ◆ Review/create annual budget
- ◆ Generate revenue (sponsorship, dues, etc.)
- ◆ Get assistance if needed
 - Tweet #PAYOChapters
 - Email PAYO Chapter Relations (chapterrelations@payroll.org)
- ◆ Chapter Finances
 - File annual tax returns – Federal/State/Local
 - Ensure you maintain exempt status
 - Maintain all government filings annually
 - Bank account
 - Signatories – good to have more than one to avoid challenges when the signatory is on leave
 - Electronic bank statements
 - Using Square
 - Payments through the website
- ◆ Mailbox
 - Multiple keys to P.O. Box or dedicated address for treasurer

Chapter Communications

Communications to the chapter members is vital for chapter success. Leaders of the chapter are expected to effectively communicate with chapter members. Chapter members become engaged when they are aware of chapter events and know their chapter leaders. Communications should inform your members on upcoming meetings, share breaking news, and entertain them with social media feeds and photos from chapter meetings or events. Below are suggestions to communicate with chapter members:

- ◆ Newsletter
 - A chapter newsletter should include the following information:
 - Date
 - Upcoming events and meetings
 - Chapter Officers and Board members names and contact information
 - PAYO logo and link to PAYO website Payroll.org
 - An easy way to subscribe

- ◆ Social Media
 - An important tool for chapters to remain engaged with its members. Chapters should consider forming a committee to send and monitor messages received to its social media channels. Typical social media channels for chapters:
 - Facebook
 - LinkedIn
 - Twitter
 - Instagram
- ◆ Website
- ◆ Emails

Annual Checklist

- ◆ Operations
 - Annual Succession Planning
 - Submit the Application for Chapter Re-affiliation yearly, including the chapter membership list to PAYO.
 - Review PAYO's [Local Chapter Guide](#) and compare to Chapter's by-laws.
- ◆ Filing of required tax returns
 - Federal
 - State
 - Local
- ◆ PAYO Involvement

Share your chapter accomplishments to receive recognition and prizes from PAYO.

 - Join a PAYO Committee
 - Enter the yearly chapter contests:
 - Chapter of the Year
 - Best Chapter Website
 - Best Statewide or Regional Meeting Contest
 - Chapter Pictorial
 - NPW Chapter Promotion Contest
 - NPW Chapter Photo Contest
 - NPW National Education Champions Contest
 - NPW Educational Outreach and Community Service Contest
 - NPW Local Media Outreach Contest
 - NPW Local Government Outreach Contest

- ◆ Special Events
 - Statewide or Regional Meetings
 - One-day events
 - NPW events
 - Community Outreach
 - Study groups
 - ◆ Ongoing Operations
 - Liability insurance
 - Maintaining meeting notes
 - Working with vendors/sponsors
 - Chapter meetings
 - Organize chapter meetings/speakers at the beginning of the year
 - Survey the membership at the end of the year for topics for next year
 - Mentor members who are interested on the scheduled topics to be a back-up for scheduled speakers
 - Use Outlook/website/Cvent to schedule delivery of newsletters, meeting notices, etc.
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**PAYO would like to thank the below individuals for creating this
New Chapter Officer Guide:**

Owren Astorga

Susan Baptista, CPP

Debbie Couch, CPP

Ronald Gilson, CPP

Billy Meyerkorth, CPP

LaTisha O'Neal, CPP

Stephanie Salavejus, CPP

Michael Schoelles, CPP

Christine Stolpe, CPP