

President Job Description

The President serves as the executive head of the Probus club and oversees all club operations. NOTE: IT IS BENEFICIAL FOR THIS POSITION TO BE A FULL WILD APRICOT ADMINISTRATOR TO OVERSEE THE CLUB OPERATIONS

1. Chairs Management Team meetings by:

- determining date, time and location of meetings
- booking meeting venues
- developing the meeting agenda
- communicating pertinent information received from Probus Canada

2. Chairs General membership meetings by:

- determining date, time and location of meetings
- booking meeting venues
- developing the meeting agenda
- working with volunteers and presenters to ensure necessary preparations are completed
- communicating pertinent information received from Probus Canada

3. Oversees all club operations by:

- attending meetings, as club representative, called by Probus Canada and Probus clubs of Ontario
- attending meetings, as club representative, called by Durham Region clubs
- acting as official spokesperson of the club
- acting as one of the signing officers for the Club bank account
- acting as an ex-officio member of all standing committees of the club
- assisting other MT members in resolving club issues
- ensuring that all actions of the MT are in accordance with the Constitution, policies, and practices of Probus Canada and the By-Laws of this Probus Club
- appointing the MT's nominating committee
- communicating via newsletter, website and meetings, pertinent club information to members (examples are MT nomination process, by-law changes, survey results)
- arranging regular surveys of membership about satisfaction with club operations
- ensuring regular reviews of club By-Laws, and arranging for membership comment on changes
- appointing a suitable person (a Probus member with a financial background) to review the financial records of the club on an annual basis and to present review results to MT and at the Annual General Meeting
- acting as the registered owner of the club Wild Apricot account and Zoom account

Vice President Job Description

The Vice President serves as the executive head in the President's absence or at the President's request.

1. Assists the President by:

- chairing the Management Team meetings and General membership meetings as requested
- working on special projects as requested
- attending Probus Centre-Canada and Probus Ontario meetings as requested

2. Arranges greeters for monthly membership meetings by:

- identifying volunteers to be greeters and maintaining list of greeters
- providing greeters with information about meeting venue and content so they can assist members

3. Acts as one of the signing officers for the Club bank account

Past President Job Description

The Past President provides guidance and assistance to the President and chairs the Nominating Committee.

1. Provides guidance and assistance to President by:

- informing them of past activities and decisions of the club
- proposing options for consideration

2. Chairs the Nominating Committee by:

- NOTE: Nominating committee of three – consisting of Past President, current President and a member of the club (usually a past president)
- identifying vacancies and possible nominees for Management team
- presenting list of Management Team nominees to the Annual General Meeting and making a motion to approve list of nominees. This is followed by a seconder and a vote by the membership (if more than one nominee is presented for a position, a secret ballot vote must be held).

Secretary Job Description

The Secretary records and maintains meeting minutes as well as other club documentation.

1. Records meeting minutes by:

- keeping minutes of all meetings of MT and General Membership Meetings (should be brief and a summary of discussions with all motions and decisions made) including count of members present
- emailing draft minutes to MT for review and comments as soon after the meeting as possible
- making changes from the review and sending out final draft prior to MT meetings
- presenting minutes at the MT meetings for approval
- forwarding approved minutes of GMM to Webmaster for posting

2. Maintains minutes and other club documentation by:

- keeping a chronological list of motions passed by the MT and provides to President on a regular basis and to other MT members periodically as requested
- keeping a list by category of motions passed by MT and providing to President on a regular basis and to other members of MT periodically as requested
- keeping an up-to-date copy of the Club By-laws and Probus Canada Constitution
- keeping a filing system for all correspondence and documents to be available for future secretaries and executives
- filing all approved minutes of MT meetings and General Membership Meetings

3. Arranges for replacement Secretary in case of absence of Secretary by:

- identifying replacement Secretary
- ensuring replacement is informed about status and issues about minutes and other documentation

Treasurer Job Description

The Treasurer is responsible for controlling and safeguarding all aspects of the club's finances. NOTE: THIS POSITION MUST BE A FULL ADMINISTRATOR IN WILD APRICOT TO PERFORM THEIR DUTIES

1. Reports financial status by:

- preparing and presenting financial statements for monthly MT meetings; providing copy to Secretary to be attached to minutes
- preparing and presenting financial report at membership meetings as requested by the President (presents financial highlights twice yearly)
- ensuring that reviews of annual financial statements are prepared and presented to the membership for approval whenever requested by the President during the year
- ensuring that books are reviewed before the Annual General Meeting and review report is presented to the membership for approval at the AGM
- preparing the annual budget forecast for approval by the MT
- preparing special financial reports as requested e.g. specific social event

2. Records and controls financial transactions by:

- following generally accepted accounting practices when recording financial transactions
- entering transactions in the Book of Account(Club computer software Sage 50)
- making suitable arrangements for the handling and safekeeping of cash
- ensuring that all bills for goods and services purchased by the club are promptly paid

3. Performs financial transactions by:

- paying for Probus Canada fees and insurance
- preparing payment cheques, as required, which are signed by two of the MT who have signing authority (examples of payments are for speakers, social events, expense reimbursement)
- depositing or arranging for deposit all monies received by the club (example Share the Wealth)
- reconciling credit card payments for new members, membership renewals, social events and deposits with documentation such as online reports in Wild Apricot and Affinipay
- creating credit card refunds when investigation confirms the need
- performing all banking transactions and record keeping

4. Assists other MT members by:

- providing advice about club financial matters as requested

Membership Chair Job Description

The Membership Chair manages the applications and renewals for membership in the club. NOTE: THIS POSITION MUST BE A PARTIAL ADMINISTRATOR IN WILD APRICOT TO PERFORM THEIR DUTIES

1. Manages applications for new membership by:

- encouraging recruiting of new members as determined by MT limitation on membership (capping)
- responding to inquiries about membership by directing people to club website
- checking for online membership applications to approve or reject. Approval is based on criteria being met and dues being paid
- printing out new members' forms to be filed
- periodically ordering name badges and distributing to new members
- sending new members a welcome email

2. Manages renewals of returning members by:

- encouraging members to renew on time through newsletter and at GMMs
- in September, maintaining a list of non-renewals and forwarding to MT as needed
- moving non renewals to Archives on website

3. Communicates status of membership by:

- reporting to MT each month the number of members and any issues e.g. capping, waiting list
- informing members via newsletter and/or presentation at meetings about membership requirements e.g. renewal process and timing, privacy and non-business use of membership directory

4. Manages Guest registrations by:

- maintaining a Guest Registry at membership meetings
- ensuring Guests provide sponsoring member's name and sign the registry

5. Holds Welcome/Orientation meetings throughout the year as needed

6. Notifies the membership of the passing of a member or a members' spouse/partner

Social Events Chair Job Description

The Social Events Chair is responsible for ensuring that social events are regularly offered to members throughout the year. NOTE: THIS POSITION MUST BE A PARTIAL ADMINISTRATOR IN WILD APRICOT TO PERFORM THEIR DUTIES

1. Chairs Social Committee by:

- determining date, time and agenda of committee meetings
- approving minutes of meetings prepared by Committee Secretary
- recruiting volunteer committee members and providing forms and training

2. Plans and organizes social events with Social Committee by:

- researching possible events, venues, meals, accommodation and transportation to them
- contacting Social Chairs of other Probus clubs to identify possible events or to identify joint events
- conducting periodic surveys of the membership to identify possible events
- determining budgets for the events and event fee INCLUDING Wild Apricot expense;
- requesting funds from Management Team if subsidization required
- booking and/or organizing events e.g. Christmas Party, theatre
- Setting up website to inform of events and allow online registration and payment of members and guests for events
- arranging for ticket printing, or decorations, if required
- identifying an Emcee for an event or acting as the Emcee
- getting online reports about registrants and menu choices to pass on to venue
- assisting incoming Social Chair to plan events by supplying them with past event files, forms, contact numbers etc.

3. Informs membership about social events by:

- setting up event details on website and scheduling announcement emails
- preparing article for monthly newsletter
- presenting event information at monthly membership meetings
- reporting to Management Team at MT meeting

4. Accounts for finances of social events by:

- preparing financial information once each event is completed
- forwarding invoices of monies to be paid for event to Treasurer e.g. DJ, venue
- preparing expense claims for monies paid for events for reimbursement by Treasurer
- ensuring receipts are received for monies paid out as documentation for Treasurer

5. Organizes an annual appreciation event for all club volunteers, e.g. breakfast or lunch event

Speaker Chair Job Description

The Speaker Chair arranges speakers for every monthly General meeting of the club.

1. Researches speakers by:

- attending other clubs' meetings, attending other organizations' meetings etc. to hear and evaluate speakers
- investigating speakers recommended by sources to confirm suitability, such as Probus Global Speakers Corner and the Probus Speaker Database.

2. Books speakers by:

- contacting speakers and booking date as well as determining fee
- informing Treasurer of speaker name and fee to ensure cheque is prepared before meeting
- identifying any special requirements for speaker presentation e.g. screen, book table and ensuring the aids are ready
- communicating to general meeting venue the seating arrangements required for speakers
- identifying and contacting backup speakers for no shows
- introducing and thanking speakers; providing thank you card and cheque
- providing hospitality to speaker before and after meeting
- arranging for "Who am I?" talks by club members, if a club is interested

3. Establishes and communicates speaker schedule by:

- informing Newsletter Editor and Webmaster of speaker schedule and changes for inclusion in newsletter and website updates
- informing Management Team of upcoming schedule and evaluating speakers after presentations made
- proposing annual budget for speaker fees to Management Team for approval
- preparing a schedule of speakers for the year
- assisting the incoming Speaker Chair by preparing speaker schedule for the first two or three months following the end of the club year

Newsletter Chair Job Description

The Newsletter Chair is responsible for publishing the Club newsletter monthly.

1. Designs newsletter by:

- determining appropriate software to use e.g. Word, Publisher, PDF
- determining length and layout of pages, as well as order of submissions
- identifying items for inclusion such as tasteful jokes, etc.

2. Informs membership about newsletter requirements by:

- writing newsletter announcements about timing and format of submissions
- sending reminder notices to contributors e.g. President, Interest Group Leaders, Social Chair

3. Edits newsletter submissions by contributors by:

- correcting spelling, grammar and font
- working with contributor to improve article e.g. condense a lengthy article to fit layout
- ensuring privacy of information in submission content
- reviewing submissions with President as necessary before distribution

4. Publishes newsletter by:

- incorporating submissions into newsletter software
- forwarding newsletter to Webmaster for posting on website

Interest Group Chair Job Description

The Interest Group Chair facilitates the establishment and promotion of interest groups in the club and provides overall coordination and support to interest groups.

1. Facilitates the establishment of new interest groups by:

- soliciting ideas for interest groups from membership or from Interest Group Leaders or obtaining ideas from other clubs
- providing opportunity for interest group sign-up, either online or other method, as needed, working with Wild Apricot Administrator
- soliciting for new Group Leaders at general meetings or announcement in newsletter

2. Promotes existing interest groups by:

- providing updates at General meetings about activities of interest groups
- arranging for Interest Group Leaders to speak as required

3. Provides overall coordination and support to interest groups by:

- informing Group Leaders about their responsibilities to determine their group's venue, meeting frequency; establish rules, membership eligibility and group size; be aware that any cost and outlays are sole responsibility of interest group to manage; send monthly input and updates to Newsletter Chair for publication and copy group for awareness; keeping a record of attendees at each group meeting for liability purposes; interact with Social Chair when activities or events may affect or involve General Probus membership
- helping to resolve issues if required with Group Leaders
- gathering information from Group Leaders in order to maintain a current list of interest groups and activities which is made available to Newsletter chair, Webmaster and Wild Apricot Administrator

Webmaster Job Description

The Webmaster is responsible for maintaining the web pages on the club's website. NOTE: THIS POSITION MUST BE A FULL ADMINISTRATOR IN WILD APRICOT TO PERFORM THEIR DUTIES

1. Maintains club website by:

- Updating content of web pages in a timely manner, e.g. photo gallery, speakers, newsletters, GMM minutes, Interest Groups, MT changes, etc. Note that MT determines web content
- Changing or improving design of web pages
- Posting updated documents such as club bylaws, MT job responsibilities
- Creating and deleting web pages as the need dictates by MT
- Archiving web content when required

2. Creates email templates and sends out emails on behalf of the club e.g. reminders about GMMs, newsletter availability

3. Acts as main contact for general online requests from members and public and passes request to appropriate MT member for action

4. Manages club's Google account.

Wild Apricot Administrator Job Description

NOTE: THIS POSITION MUST BE A FULL ADMINISTRATOR IN WILD APRICOT TO PERFORM THEIR DUTIES

The Wild Apricot Administrator is responsible for managing the database portion of the club website

1. Manages the database of the club website by:

- Setting up new uses for the database functionality e.g. Interest Group sign up, poll
- Resolving issues that are identified, either by correcting them or contacting Wild Apricot company
- Checking regularly that all aspects of the database are working correctly e.g. contact numbers, balances owing, event setups, email delivery, volunteer group updates
- Updating training documents for Partial Administrators such as Social Chairs, Membership Chair
- Staying current with Wild Apricot software updates and evaluating impact to club account

2. Assists members in use of the system, either through personal assistance or information in newsletter or emails

3. Maintains contact with Administrators in other Probus clubs to seek or provide information

4. Manages club's Wild Apricot account

Other ongoing Volunteer positions who assist Probus Management Team (no voting rights)

Ticket Sellers- handles Share the Wealth and coffee/cookie sales at monthly meetings and provides tally to the Treasurer as well as Secretary. Provides half portion of Share the Wealth monies to President to give to winner of ticket draw.

Coffee Provider – obtains coffee, tea, cream, sugar for monthly meetings. (Discontinued for now)

Cookie Provider-obtains cookies and occasionally cake or other treats on MT request for monthly meetings.

A/V technical support– provides support to Speaker Chair and President at monthly meetings by ensuring A/V equipment required is available and working.