Book of Tasks

# Introduction

Each Chair Function on the board of director has a set of tasks that he or she must perform for the function.

The Chair of each function is responsible for:

* Finding volunteers to do the tasks in each area and keep a record of who is doing what.
* Manage the length of the volunteer period for a given task
* Document new tasks as needed
* Keep a running list of who has volunteered throughout the year as recognized
* Report status of the tasks at the monthly board meeting
* Train volunteers on the task

The Chair for each function will be awarded with a silver membership to ISPI International (Cost of $95). This membership will entitle them to the Bronze membership benefits plus:

* [Knowledge Center](https://ispi.bridge2know.biz/) dashboard (widgets), messaging, and communication
* Knowledge Center podcasts
* Opportunity to volunteer
* Limited webinars, e.g., three of 12
* Limited number of articles from *PIQ* and *PIJ*
* Special pricing on professional liability, health, dental, life, long-term care and automobile insurance (for U.S. residents only)

This book is the current master list of tasks. (as of date?)

**Membership Tasks**

**Current Chair: Sue Czeropski**

**Total task time for Membership Chair if no volunteers ~ 25 hrs/year**

**TASK: Welcome New Members**

Action:

Check the website weekly for new members

Send them the standard welcome letter

Time per week:

Up to **10 minutes / month** depending on how many new members join the chapter

Name Responsible: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Start Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**TASK: Send follow up reminders to those who need to renew**

Action:

Log into ISPIBay.org –Admin view

Go to members/summary tab

Look to see who is up for renewal

Send a Friendly reminder that they are up for renewal

Up to **10 minutes / month**  depending on who is up for renewal

Name Responsible: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Stat Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**TASK: Send follow up reminders to those who membership is about to lapse**

Action:

Log into ISPIBay.org –Admin view

Go to members/summary tab

Look to see who’s membership is about to relapse

Send a Friendly reminder that their membership is about to lapse-include a comment that if they choose not to renew would they mind spending a few minutes with chapter president on the phone to do an exit interview

Up to **10 minutes / week** depending on who is about to lapse

Name Responsible: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Stat Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**TASK: Maintains a current membership list**

Action:

Pull an excel report of the membership off the Web Site Quarterly

Fields to contain name; email address; phone if available; membership in ISPI international- identify board members

Send to president once a quarter to be included in Chapter quarterly report

Time per year: 20 min. per quarter; 1 hour per year

**This task must be done on a quarterly basis by the end of each quarter**

**Q1-Jan-March; Q2 April-June; Q3 July-Sept; Q4 Oct.-Dec**

**Time per year = 1 hour**

Name Responsible: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Stat Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**TASK: Generate Monthly Membership Report**

Action:

Log into ISPIBay.org –Admin view

Go to members/summary tab

Make a copy of the table (print screen)

Take notes on who is new; who is up for renewal; who needs to pay

Put it in a .ppt slide

Send to Sue to incorporate into monthly meeting (First Friday of each month)

Time per month:

Up to **20 minutes/month depending on the stats**

**This task must be done on a monthly basis- Time per year = 4 hours**

Name Responsible: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Stat Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 **Recruitment Tasks**

**Current Chair: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(vacant)**

**Total task time for Recruitment chair if no volunteers = ~20 per year**

**TASK: Develop and implement an outreach strategy to recruit new volunteers.**

Action:

Person responsible for coming up with a plan to do this on a routine basis

Develop a plan

Get board approval of plan

Execute to plan and keep board abreast of progress

Up to **2 hours per month**

Name Responsible: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Stat Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**TASK: Coordinate, manage & track all volunteers by maintain a master chapter volunteer status list**

Action:

Create the list-put it up in the share drive

Keep the list up to date

Notify the board if changes to the volunteer list

Up to **15 min. per month**

Name Responsible: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Stat Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**TASK:**

Action:

Person responsible for coming up with a plan to do this on a routine basis

Develop a plan

Get board approval of plan

Execute to plan and keep board abreast of progress

Up to **2 hours per month**

Name Responsible: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Stat Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Finance Tasks**

**Current Chair: Sue Czeropski**

**Total task time if not volunteers for Finance Chair is ~40 hrs/year**

**TASK: Transfer money from Pay Pal to WF when balance > $500**

Action:

Check balance of Paypal account periodically

Perform Paypal transaction

Verify transaction took place

Notify finance chair money transferred

Time: <5 min. per month

Name Responsible: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Stat Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**TASK: Do monthly finance Report**

Action:

Check balance of Paypal account and transactions

Check Bank account balance and transactions

Reconcile accounts if needed

Fill out finance report (template exists)

Give to financial chair

Time: ~1 hour per month at the end of each month

Name Responsible: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Stat Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**TASK: File EZ Tax Form at year end**

Action:

Find EZ tax Form on line

Fill out form on line

Copy form and send to finance chair

Time: <30 min. per year

Name Responsible: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Stat Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**TASK: Create annual budget**

Action:

Get budget inputs from Chair Men and Ladies

Draft a “boiler plate” budget (forms available)

Conduct budget meeting to review proposed budget

Periodically review spending based on plan

Time: <4 hours per year

Name Responsible: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Stat Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**TASK: Manage chapter renewals when they laspe**

Action:

Look at member summary on website monthly (at end of month)

Determine if any pending renewals or new members who have not paid

Send an email reminder to pay dues

Communicate to finance chair all actions taken in the month

Time: <15 min. per month

Name Responsible: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Stat Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Marketing Tasks

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| TASK: Create and edit New Events on chapter website ispibay.orgAction:1. Get event information from the yearly program plan or Program VP/Chair
2. Select any existing event, click “**Duplicate**”
3. Open the duplicated event, click “**Edit**”
4. Edit “Title”, “Tags”, “When and where”, “List of event registrants -- Show registrants who want to be listed”, “Guest registration -- Add new guests to contacts list only if email entered”, “Description”
5. After editing, change event access permission (up left side) from “Admin only” to “public”
6. Upon new information, edit the existing events following step 3 and step 4
7. Upon new information, edit automatic email notification to registrants if needed

Time per week1 hour or soName responsible:Start Date: |

Marketing Tasks

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| TASK: Send event announcement/marketing communication emails out to contacts and members Action:1. Get event information from chapter website, or any activity/campaign information from stakeholders
2. For regular webinar announcement, please follow the current template, and make necessary revisions
	1. On chapter website-admin page, select recipients(all contacts), send out email blast
	2. Use ISPIBAY@gmail.com to send out email blast to all Gmail contacts
3. For others, draft up email blast, and invite stakeholders to review/revise until reaching consensus
	1. On chapter website-admin page, select recipients(members or contacts), send out email blast; Or exporting members or contacts’ email list, use ISPIBAY@gmail.com to send out email blast

Time per weekless than 1 hourName responsible:Start Date: |

Marketing Tasks

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| TASK: Maintain chapter website ispibay.org up to dateAction:1. Get information from the president or the other board members
2. Click “**Website**” -- **“Home” or “News”,** depending on the nature of content
3. Click **“Edit” for “Home” page, or “Add post” for “News”**
4. After editing, click **“Save”**

Time per weekless than 1 hourName responsible:Start Date: |

Marketing Tasks

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| TASK: Write marketing communication materials Action:1. Preparing/creating/composing posts to: Twitter(at least 3 times/week), LinkedIn-OPWL group(depending on the appropriateness of content), chapter updates for ISPI monthly publication -PerformanceXpress (at least 5 times/year)

Time per weekless than 1 hourName responsible:Start Date: |