

JOB DESCRIPTIONS

NATIONAL WEBSITE

STATE WEBSITE

15 MONTH CHECKLIST

September (ELECTED)

- Plan & Prepare **Network Budget**
- Plan your **Local Summit**
- Plan to attend State Summit in October
- Report all **incoming Board** members
- Odering Governing Board **Name Badges**
- Review financial documents with Gov. Board

October (ELECTED)

- Attend STATE Leadership Summit
- Start outline your **EVENTS**
- Sign **affiliation agreement**
- Prepare for **Hand-over (from P-PE)**
- Ratify all incoming Board members
- Review financial documents with Gov. Board

November Start 16th

- Appoint **Strategic Planning** Team for next year
- Appoint **Candidate Review** Team for next year
- Appoint **Audit Review** Team for next year
- Get **Passwords**
- Register for Mid-winter Orlando conf.
- Present Local Budget to Governing Board

December

- Change Officers at the Bank
- Send Event Calendar to DVP
- Upload calendar on wcr.org
- Change your President Message on Microsite
- Review financial documents with Gov. Board

January

- Identify future Leader within Local Network
- Attend Mid-Winter Meeting
- Ensure annual **AUDIT** is planned
- Check if Sunbiz was renewed
- Review financial documents with Gov. Board

February

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- Register for Mid-Year Conf. in Washington DC
- Upload End-of-year **AUDIT**
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- Review financial documents with Gov. Board

March

- TAXES?** – check with Treasurer and CPA
- Register for Mid-year Conf. in Washington DC
- Year to date/budget vs. actual report
- Review financial documents with Gov. Board

April

- Upload Tax filing report
- Start with Destination Basket for Orlando
- 
- Review financial documents with Gov. Board

May

- Remind **Candidate Review Team** to start
- Attend Mid-year Conf. in Washington DC
- 
- Review financial documents with Gov. Board

June

- ensure that Application for election are send
- Leadership Identification opens
- Year to date/budget vs. actual report
- Review financial documents with Gov. Board

July

- start with **Network Certification** documentation
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- Review financial documents with Gov. Board

August

- ensure ½ year in house **AUDIT is planned**
- Have the **election** (no later than 08/10)
- Attend WCR Conference in Orlando
- Review financial documents with Gov. Board

September

- complete **Network Certification**
- Report network dues changes to National
- Year to date/budget vs. actual report
- Review financial documents with Gov. Board

October

- let PE run the governing Board meeting
- Prepare for **Hand-over (from P-PE)**
- Review financial documents with Gov. Board
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November

- Attend National Convention
- provide all **Passwords**
- Pass the Baton on November 14th**
- Review financial documents with Gov. Board

ADDITIONAL RESOURCE

- Holding a Governing Board meeting**
- Protocol and Etiquette**
- Governing Board AGENDA**
- Governing Board Minutes**
- Governing Board Chart**
- Marketing & Communication Project TEAM**

ADDITIONAL RESOURCES

- National EVENTS**
- Election Procedure**
- Local Network Operating Agreement**
- Election Script**
- consent to serve example**
- Officer and Director Reporting**

ADDITIONAL RESOURCES

- National Officer Visit in person**
- Brand Asset**
- Bylaws**
- 2022 Network Guidebook**
- Insurance**

[JOB DESCRIPTIONS](#)

[NATIONAL WEBSITE](#)

[STATE WEBSITE](#)

## 15 MONTH CHECKLIST

### September (ELECTED)

- Attend Local Governing Board meetings
- Help incoming President with [Local Summit](#)
- Plan to attend State Summit in October
- Appoint First Vice President**
- Review financial documents with Gov. Board

### October (ELECTED)

- Attend Local Governing Board meetings
- Help planning **EVENTS**
- Help with the Strategic Partner Package
- Get list of passwords
- Review financial documents with Gov. Board

### November

- Attend Local Governing Board meetings
- Ensure that all new Gov. Members are ratified
- Attend National Conference
- November 14th Pass the BATON**
- Review financial documents with Gov. Board

### December

- Register for Mid-winter Orlando conf.
- Appoint **Candidate Review** Team
- Change Officers at the Bank (NO Later than 12/31)
- Review financial documents with Gov. Board
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### January

- Cultivate relationship with Strategic Partners
- Attend **annual audit**
- work with the **Strategic Planning Project Team**
- Review financial documents with Gov. Board
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### February

- Identify future Leader within Local Network
- Register for Mid-Year Conf. in Washington DC
- Communicate with your Association
- Review financial documents with Gov. Board
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### March

- Leadership Identification opens
- Register for Mid-Year Conference Washington DC
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- Review financial documents with Gov. Board
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### April

- Start with Destination Basket for Orlando
- Contact the STRATEGIC PARTNERS (satisfied?)
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- Review financial documents with Gov. Board
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### May

- Remind **Candidate Review** Team to start
- Attend Mid-year conf. Washington DC
- Register for Network 360
- Review financial documents with Gov. Board
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### June

- PE Bootcamp starts
- Start your **Business Plan**
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- Review financial documents with Gov. Board

### July

- Attend for Network 360
- Register for State Conference
- Start outline your **Events**
- 
- Review financial documents with Gov. Board

### August

- Attend Aug. Conference in Orlando
- start selecting your team
- Report all incoming /elected Board members**
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- Review financial documents with Gov. Board

### September

- Plan & Prepare **Network Budget**
- Plan your **Local Summit**
- Plan to attend State Summit in October
- Ordering Governing Board **Name Badges**
- Review financial documents with Gov. Board

### October

- Sign **Affiliation Agreement**
- Attend State Summit
- Prepare for **Hand-over (PE - P)**
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- Review financial documents with Gov. Board

### November

- day after Nat. conference **Pass the BATON**
- Congratulation your are the PRESIDENT
- Register for Mid-Winter Conf. in Orlando
- Hold the Gov. Board meeting
- Review financial documents with Gov. Board

#### ADDITIONAL RESOURCE

- [Audit Guideline](#)
- [Holding a Gov. Board meeting](#)
- [Marketing & Communication Project TEAM](#)
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#### ADDITIONAL RESOURCES

- [Bylaws](#)
- [consent to serve example](#)
- [Local Network Operating Agreement](#)
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#### ADDITIONAL RESOURCES

- [PE Job Description more detailed](#)
- [Project Team Chart board example](#)
- [Report Officers to Nat.](#)
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15 MONTH CHECKLIST

September (ELECTED)

- Attend Local Governing Board meetings
- Attend monthly zoom calls with State Treasurer
- meet with Treasurer to learn
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October (ELECTED)

- Attend Local Governing Board meetings
- Attend monthly zoom calls with State Treasurer
- meet with incoming President to go over budget
- assist current Treasurer to learn
- attend State Summit via zoom
- prepare/review financial docs with Gov. Board

November

- get access to Quickbooks (keep current T
- Review Bank Statements
- review Local Standing Rules and Procedure
- Review Financial Policy & Procedure Doc.
- Attend monthly zoom calls with State Treasurer
- prepare/review financial docs with Gov. Board

December

- Change Officers at the Bank
- download chart of accounts (for overview)
- ensure unearned revenue is marked correctly
- Deferred expenses for next year coded properly
- Attend monthly zoom calls with State Treasurer
- prepare/review financial docs with Gov. Board

January

- Prepare everything for Annual AUDIT
- send travel reimbursement forms to attendees
- upload new budget
- check all accounts for correct name
- unearned revenue is re-coded to current year
- prepare/review financial docs with Gov. Board

February

- Attend monthly zoom calls with State Treasurer
- check travel reimbursement forms
- Renew on SUNBIZ
- outstanding expenses from previous year are coded to the correct year
- prepare/review financial docs with Gov. Board

March

- Identify future Leader within Local Network
- Attend monthly zoom calls with State Treasurer
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- prepare/review financial docs with Gov. Board

April

- file TAX
- Attend monthly zoom calls with State Treasurer
- Prepare quarterly Audit
- Present 1st quarter budget versus actuals to governing board / it might need to be re-assessed
- prepare/review financial docs with Gov. Board

May

- Attend monthly zoom calls with State Treasurer
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- prepare/review financial docs with Gov. Board

June

- Attend monthly zoom calls with State Treasurer
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- prepare/review financial docs with Gov. Board

July

- Attend monthly zoom calls with State Treasurer
- Prepare quarterly Audit
- Present 2nd quarter budget versus actuals to governing board / it might need to be re-assessed
- prepare/review financial docs with Gov. Board

August

- Attend Aug. Conference in Orlando
- Attend monthly zoom calls with State Treasurer
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- send travel reimbursement forms
- prepare/review financial docs with Gov. Board

September

- Help to prepare Network Budget
- check travel reimbursement forms
- meet incoming Treasurer
- Attend monthly zoom calls with State Treasurer
- prepare/review financial docs with Gov. Board

October

- meet with CPA
- Attend monthly zoom calls with State Treasurer
- Present 3rd quarter budget versus actuals to governing board / it might need to be re-assessed
- prepare/review financial docs with Gov. Board

November

- hand over all books to new Treasurer
- help preparing financial documents for Gov.
- assist incoming Treasurer
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ADDITIONAL RESOURCE

- [Travel Reimbursement](#)
- [Audit Guideline](#)
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- [Reimbursement form](#)
- [Local Network Operating Standards](#)
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ADDITIONAL RESOURCES

- [Bylaws](#)
- [TAX](#)
- [SUNBIZ ANNUAL REPORT](#)
- [SUNBIZ - report changes](#)
- [Sunbiz Name change](#)

ADDITIONAL RESOURCES

- [Quickbook Tips](#)
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<b>A</b> <a href="#">Agenda example</a> <a href="#">American Flag</a> <a href="#">Audit guideline</a> <a href="#">Awards</a>	<b>K</b>	<b>S</b> <a href="#">SAVINGCENTER WCR Secretary/First Vice President</a> <a href="#">Secretary/First Vice President more detailed</a> <a href="#">State Bylaws</a> <a href="#">State Operating Networks</a> <a href="#">Standing Rules podcast</a> <a href="#">Strategic Partner</a> <a href="#">SUNBIZ - Annual Report</a> <a href="#">SUNBIZ - report changes</a>
<b>B</b> <a href="#">Bag of Tricks</a> <a href="#">Banners</a> <a href="#">Brand Assets</a> <a href="#">Budget Annual</a> <a href="#">Bylaws LOCAL</a>	<b>L</b> <a href="#">Leadership Changes</a> <a href="#">Leadership Identification LID NATIONAL</a> <a href="#">Local Network Business Plan</a> <a href="#">Local Network Model</a> <a href="#">Local Network Operating Agreement</a> <a href="#">Local Summit</a> <a href="#">Logo for Personal documents/websites</a> <a href="#">Logo Leaders Made Here</a>	<b>T</b> <a href="#">Taxes</a> <a href="#">Teamstore WCR</a> <a href="#">Travel Reimbursement</a> <a href="#">Treasurer more detailed</a>
<b>C</b> <a href="#">Candidate Review Team</a> <a href="#">Colors of Women's Council</a> <a href="#">Consent to Serve example</a>	<b>M</b> <a href="#">Marketing &amp; Communication Project Team</a>	<b>U</b>
<b>D</b> <a href="#">Dresscode coming soon</a>	<a href="#">Membership Director</a> <a href="#">Microsite Resources</a> <a href="#">Microsite Resources Video</a> <a href="#">Minutes example</a> <a href="#">Minutes for Election example</a>	<b>V</b> <a href="#">Volunteer Town Square</a>
<b>E</b> <a href="#">Election Procedure</a> <a href="#">Election Script</a> <a href="#">Event Budget Planner</a> <a href="#">Event Director</a> <a href="#">Event Planning</a> <a href="#">Events Director more detailed</a> <a href="#">Excel - more than a calculator program</a>	<b>N</b> <a href="#">Network Glossary</a> <a href="#">Name Badges</a> <a href="#">National Event Calendar</a> <a href="#">National Officer Visit in person</a> <a href="#">National Officer Visit virtual</a> <a href="#">Network Certification</a>	<b>W</b> <a href="#">Website info</a>
<b>F</b> <a href="#">Flag</a>	<b>O</b> <a href="#">Protocol &amp; Etiquette</a> <a href="#">Past Presidents list Florida</a> <a href="#">Pledge of Allegiance</a> <a href="#">President Elect Job Description</a> <a href="#">President Elect more detailed</a> <a href="#">President Job Description</a> <a href="#">President more detailed</a> <a href="#">Project Team Chart Board Example</a>	<b>Y</b> <a href="#">YOU TUBE National</a>
<b>G</b> <a href="#">Google Drive - shared folders</a>	<b>Q</b>	<b>Z</b> <a href="#">Zoom background ABSTRACT</a> <a href="#">zoom background GEOMETRIC</a> <a href="#">Zoom background SOLID BLUE</a>
<b>H</b> <a href="#">Hand over - from President to President E</a> <a href="#">Holding a Governing Board Meeting</a>	<b>R</b> <a href="#">Recruitment Strategy</a> <a href="#">Roadmap Archives</a>	<b>VIDEO</b> <a href="#">Local Network Model in a Nutshell</a> <a href="#">Protocol Training</a> <a href="#">Mock Governing Board Meeting</a> <a href="#">Local Network Certification Training</a>
<b>I</b> <a href="#">Inspiration</a> <a href="#">Insurance</a>		
<b>J</b> <a href="#">Job Description example</a> <a href="#">Job Description from National</a>		