

JOB DESCRIPTIONS

NATIONAL WEBSITE

STATE WEBSITE

17 MONTH CHECKLIST

July (ELECTED)

- Plan & Prepare **Network Budget**
- Plan your **Local Summit**
- Start outline your **EVENTS**

August (ELECTED)

- Attend National 360 in Chicago
- Attend STATE Conference on Orlando
- Sign **affiliation agreement - wcr.org /local forms**
- Report all incoming Board members to STATE

September (ELECTED)

- Attend STATE Leadership Summit
- Start with your **Strategic Partner Package**
- Hold your **Local Summit**
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October (ELECTED)

- Oding Governing Board **Name Badges**
- Finalize Installation
- Prepare for **Hand-over (from P-PE)**
- Present Budget to Governing Board for approval

November Start 1 day AFTER NAT. Conference

- Sign **affiliation agreement if not done yet**
- Get **Passwords - checklist**
- Review financial documents with Gov. Board

December

- Appoint **Strategic Planning** Team
- Appoint **Candidate Review** Team
- Appoint **Audit Review** Team
- Register for Mid-winter Orlando conf.
- Change Officers at the Bank

January

- Attend Mid-Winter Meeting
- Send Event Calendar to DVP /upload to website
- Ensure end of year **AUDIT** is planned
- Change your President Message on Microsite
- Review financial documents with Gov. Board

February

- Identify future Leader within Local Network
- Register for Mid-Year Conf. in Washington DC
- Upload End-of-year **AUDIT**
- Check if Sunbiz was renewed
- Review financial documents with Gov. Board

March

- TAXES?** – check with Treasurer and CPA
- Ensure Standing Rules are updated
- Remind **Candidate Review Team** to start
- Year to date/budget vs. actual report
- Review financial documents with Gov. Board

April

- Upload Tax filing report
- ensure that Application for election are send
- send out election information
- Review financial documents with Gov. Board

May

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- Start with Destination Basket for Orlando
- Attend Mid-year Conf. in Washington DC
- Review financial documents with Gov. Board

June

- have your **election** by the end of the month
- report all elected positions to STATE
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- Review financial documents with Gov. Board

July

- Leadership Identification opens - wcr.org
-
- Year to date/budget vs. actual report
- Review financial documents with Gov. Board

August

- start with **Network Certification** documentation
- ensure ½ year in house **AUDIT is planned**
- Attend WCR Conference in Orlando
- Review financial documents with Gov. Board

September

- complete **Network Certification wcr.org**
- Report network dues changes to National
-
- 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

November

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

ADDITIONAL RESOURCES

- [Holding a Governing Board meeting](#)
- [Protocol and Etiquette](#)
- [Governing Board AGENDA](#)
- [Governing Board Minutes](#)

JOB DESCRIPTIONS

NATIONAL WEBSITE

STATE WEBSITE

17 MONTH CHECKLIST

July (ELECTED)

- Attend Local Governing Board meetings
- Help incoming President with [Local Summit](#)
- Ensure that all new Gov.Members are reported
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- Review financial documents with Gov. Board

August (ELECTED)

- Attend Local Governing Board meetings
- Attend Network 360
- Help with the [Strategic Partner Package](#)
- Attend State Conference if budget allows
- Review financial documents with Gov. Board

September

- Attend Local Governing Board meetings
- Help planning [EVENTS](#)
- Attend State Summit
- Help incoming President with [Local Summit](#)
- Review financial documents with Gov. Board

October (ELECTED)

- Attend Local Governing Board meetings
- Help incoming President with local summit
- Ensure that proposed budget is approved
-
- Review financial documents with Gov. Board

November

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

December

- Attend Local Governing Board meetings
- Ensure that the website is up-to-date
- Register for Mid-winter Orlando conf.
- Change Officers at the Bank (NO Later than 12/31)
- Review financial documents with Gov. Board

January

- Attend Local Governing Board meetings
- Ensure you have an [Candidate Review Team](#)
- Ensure you have an [Audit Project Team](#)
-
- Review financial documents with Gov. Board

February

- Attend Local Governing Board meetings
- Cultivate relationship with Strategic Partners
- Attend [annual audit at ex officio](#)
- work with the [Strategic Planning Project Team](#)
- Review financial documents with Gov. Board

March

- Identify future Leader within Local Network
- Register for Mid-Year Conf. in Washington DC
- Communicate with your Association
- Review financial documents with Gov. Board
- Remind [Candidate Review](#) Team to start

April

- Attend Local Governing Board meetings
- Contact the STRATEGIC PARTNERS (satisfied?)
- Register for Mid-Year Conference Washington DC
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- Review financial documents with Gov. Board

May

- Attend Local Governing Board meetings
- Start with Destination Basket for Orlando
- Attend National Conf. in DC if budget allows
- Leadership Identification opens
- Review financial documents with Gov. Board

June

- Attend Local Governing Board meetings
- Start your [Business Plan](#)
- Register for Network 360
- Review financial documents with Gov. Board
- PE Bootcamp starts

July

- Attend Local Governing Board meetings
- PE Bootcamp starts
- Start outline your [Events](#)
- Attend 1/2 year [audit at ex officio](#)
- Review financial documents with Gov. Board

August

- Attend Local Governing Board meetings
- Attend for Network 360
- Attend State Conference in Orlando
- Plan & Prepare [Network Budget](#)
- Review financial documents with Gov. Board

September

- Attend Local Governing Board meetings
- Attend State Summit
- Start selecting your Project Teams
- Have your Local Summit
- Review financial documents with Gov. Board

October

- Attend Local Governing Board meetings
- Present proposed budget to gov. board
- Sign [Affiliation Agreement -wcr.org/local forms](#)
- Ordering Governing Board Name Badges
- Review financial documents with Gov. Board

November

- Hold Governing Board (with P)
- Prepare for [Hand-over \(PE - P\)](#)
- Attend National Conference if budget allows
- day after Nat. conference **Pass the BATON**
- Review financial documents with Gov. Board

ADDITIONAL RESOURCE

- [Audit Guideline](#)
- [Holding a Gov. Board meeting](#)
- [Marketing & Communication Project TEAM](#)
- [Bylaw - wcr.org local forms](#)
- [Standard Operating Procedure](#)

JOB DESCRIPTIONS

NATIONAL WEBSITE

STATE WEBSITE

17 MONTH CHECKLIST

July (ELECTED)

- Review Job description
- Review Bylaws
- Review Standing Rules
-

August (ELECTED)

- Attend Local Governing Board meetings
- Check if Line Officers are reported
- Attend State Conference if budget allows
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September (elected)

- Attend Local Governing Board meetings
- shadow First Vice President
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October (ELECTED)

- Attend Local Governing Board meetings
- Start List with contact info from all
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November

- Attend Local Governing Board meetings
- Register for Mid-winter Orlando conf.
- Get list of passwords
- Pass the BATON**
- Check if all documents are in google drive

December

- Attend Local Governing Board meetings
- prepare **minutes** at GOV. BOARD/upload to drive
- Check if all gov. members have admin rights
- Register for Mid-winter Orlando conf.
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January

- prepare **minutes** at GOV. BOARD/upload to drive
- Annual **Report on Sunbiz**
- Check Local **Standing Rules/Procedure**
- Check Website for **Bylaws/**Standing Rules
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February

- prepare **minutes** at GOV. BOARD/upload to drive
- check drive if annual Audit is uploaded to State G.
- Check Website for **Bylaws/**Standing Rules
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-

March

- Identify future Leader within Local Network
- prepare **minutes** at GOV. BOARD/upload to drive
- check drive if Audit is uploaded to STATE Google
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-

April

- prepare **minutes** at GOV. BOARD/upload to drive
- Help Membership Director
- check if all Events are posted on website
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May

- prepare **minutes** at GOV. BOARD/upload to drive
- Help with **Strategic Planning**
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-

June

- prepare **minutes** at GOV. BOARD/upload to drive
- Help Event Director
-
-

July

- prepare **minutes** at GOV. BOARD/upload to drive
- Register for State Conference
- Report Election results to State and DVP
- prepare minutes for election
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August

- prepare **minutes** at GOV. BOARD/upload to drive
- Attend State Conference
- Report Election results to National - wcr.org Local
- check drive if Audit is uploaded
-

September

- prepare **minutes** at GOV. BOARD/upload to drive
-
-
-

October

- prepare **minutes** at GOV. BOARD/upload to drive
- help incoming First Vice President
-
-
-

November

- prepare **minutes** at GOV. BOARD/upload to drive
- Report Election results to National WCR.org/form
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ADDITIONAL RESOURCE

- Example of **Agenda** for gov. meeting
- Example for **Minutes** for gov. meeting
- Example for **Minutes for ELECTION**
- Brand Assests**
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JOB DESCRIPTIONS

NATIONAL WEBSITE

STATE WEBSITE

17 MONTH CHECKLIST

July (ELECTED)

- Attend Local Governing Board meetings
- meet with Treasurer to learn
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August (ELECTED)

- Attend Local Governing Board meetings
- attend State Conference if budget allows
- assist current Treasurer to learn
- review financial docs with Gov. Board

September (ELECTED)

- Review Bank Statements
- review Local Standing Rules and Procedure
- Review Financial Policy & Procedure Doc.
- review financial docs with Gov. Board

October (ELECTED)

- Attend Local Governing Board meetings
- ask Treasurer to learn how to prepare statement
- meet with incoming President to go over budget
- review financial docs with Gov. Board
- Attend monthly zoom calls with State Treasurer
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November

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

December

- Deferred expenses for next year coded properly
- download chart of accounts (for overview)
- review Local Standing Rules and Procedure
- Change Officers at the Bank
- prepare/review financial docs with Gov. Board
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January

- send travel reimbursement forms to attendees
- download chart of accounts (for overview)
- ensure unearned revenue is marked correctly
- outstanding expenses from previous year are coded to the correct year
- ensure you are set up with BILL HIGHWAY
- prepare/review financial docs with Gov. Board

February

- Attend monthly zoom calls with State Treasurer
- check travel reimbursement forms
-
- check all accounts for correct name
- Prepare everything for Annual AUDIT
-
- prepare/review financial docs with Gov. Board

March

- Attend monthly zoom calls with State Treasurer
- ensure financial docs are uploaded to google drive
- check if all Strategic Partners have paid
-
-
- prepare/review financial docs with Gov. Board

April

- Identify future Leader within Local Network
- Attend monthly zoom calls with State Treasurer
- file TAX
- Prepare quarterly Audit
- Present 1st quarter budget versus actuals to governing board / it might need to be re-assessed

May

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

June

- Attend monthly zoom calls with State Treasurer
-
-
-
-
- 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
- meet incoming Treasurer
- send travel reimbursement forms
- prepare bi-annual AUDIT
- prepare/review financial docs with Gov. Board

September

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

October

- Start billing Strategic Partner for next year
- 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. Board
- assist incoming Treasurer
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ADDITIONAL RESOURCES

- Local Network Operating Standards
- ALL FINANCIAL DOCUMENTS need to be in the AUDIT BOOK
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<p>A</p> <ul style="list-style-type: none"> Agenda example American Flag Audit guideline Awards <p>B</p> <ul style="list-style-type: none"> Bag of Tricks Banners Brand Assets Budget Annual Business plan Bylaws LOCAL <p>C</p> <ul style="list-style-type: none"> Candidate Review Team/Election Procedure Colors of Women's Council Consent to Serve <p>D</p> <ul style="list-style-type: none"> Dresscode <p>E</p> <ul style="list-style-type: none"> Election - email to members Election Procedure Election Script Event Budget Planner Event Planning worksheet Event Director Event Planning guide Events Director more detailed Excel - more than a calculator program <p>F</p> <ul style="list-style-type: none"> Flag Financial Procedure LOCAL example <p>G</p> <ul style="list-style-type: none"> Google Drive - shared folders <p>H</p> <ul style="list-style-type: none"> Hand over - from President to President Elect Holding a Governing Board Meeting <p>I</p> <ul style="list-style-type: none"> Installation Script Insurance Introduction <p>J</p> <ul style="list-style-type: none"> Job Description example 	<p>K</p>	<p>L</p> <ul style="list-style-type: none"> Leadership REPORT form Leadership Identification LID NATIONAL Local Network Business Plan Local Network Model Local Summit Logo National for Personal documents/website Logo Leaders Made Here Linktree <p>M</p> <ul style="list-style-type: none"> Marketing & Communication Project Team Member in the BOX (Shared State Folder) Membership Director Microsite Resources Microsite Resources Video Minutes example Minutes for Election example <p>N</p> <ul style="list-style-type: none"> Network Glossary Name Badges National Events Calendar National Officer Visit in person National Officer Visit virtual Network Certification <p>O</p>	<p>P</p> <ul style="list-style-type: none"> Passwords check list Protocol & Etiquette Past Presidents list Florida Pledge of Allegiance President Elect Job Description President Elect more detailed President Job Description President more detailed Project Team Chart Board Example <p>Q</p> <ul style="list-style-type: none"> Quickbook tips 	<p>R</p> <ul style="list-style-type: none"> Roadmap Archives Report Officer to National <p>S</p> <ul style="list-style-type: none"> SAVINGCENTER WCR Strategic Partnerships Template Strategic Planning Template State Job Description State Bylaws State Operating Network procedure Standing Rules podcast Standard Operating LOCAL How to introduce Strategic Partner SUNBIZ - Annual Report <p>T</p> <ul style="list-style-type: none"> Taxes Treasurer Job Description Teamstore WCR Travel Reimbursement <p>U</p>	<p>V</p> <ul style="list-style-type: none"> Volunteer Town Square <p>W</p> <ul style="list-style-type: none"> Website info <p>Y</p>	<p>Z</p> <ul style="list-style-type: none"> Zoom background ABSTRACT zoom background GEOMETRIC Zoom background SOLID BLUE
				VIDEO		
					Local Network Model in a Nutshell	
					Protocol Training	
					Mock Governing Board Meeting	
					Local Network Certification Training	
					STREAM WCR - all videos	