



Selecting Officers

Planning Office



**NEIGHBORHOOD
ACADEMY**

Where are we?

Getting Organized

- ✓ Introduction
- ✓ Neighborhood Outreach & Welcoming
- ✓ Community Workshops
- ✓ Developing Leaders
- Selecting Officers
- Bylaws
- Running Meetings
- Financial Administration & Compliance

Topics to Cover:

- Officer Selection
- Identifying Potential Candidates
- Election Procedures
- Transition and Onboarding



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- Identifying Potential Candidates
- Election Procedures
- Transition and Onboarding

Course Summary

SELECTING OFFICERS



What are officers' roles in the neighborhood association?



President:

- Lead meetings.
- Enforce bylaws and covenants.
- Act as spokesperson.



Treasurer:

- Oversee and manage association finances (reporting, budgeting, collecting dues, writing checks, and preparing financial statements).



Vice-President:

- Assist the president in performing tasks.
- Be familiar with association's governing documents.
- Step in when president is unavailable.



Secretary:

- Send out meeting notices.
- Record meeting minutes and prepare agendas.
- Notify officers and committee members of their election.



Appointed-Chair:

- Assist the president in specific non-committee tasks.
- May co-exist with vice-president depending on distribution of responsibilities.



Committee Chairperson:

- Manage committee budget and involvement.
- Report to the board and membership.
- Copy association meeting minutes in the minutes' book.



Board of Directors:

- Responsible for establishing and reviewing policies.
- Oversee major projects.
- Cannot act individually on behalf of the group.
- Responsible for calling membership meetings at least once a year.

Activity

SELECTING OFFICERS



Who would we nominate as _____?

	_____	Must Have
President	_____	
	_____	Must Have
Treasurer	_____	
	_____	Ought-to-Have
Vice-President	_____	

Secretary	_____	

Appointed Chair	_____	
	_____	Nice-to-Have
Committee Chairperson	_____	
	_____	Nice-to-Have
Board of Directors	_____	

Course Summary

SELECTING OFFICERS



What are officers' roles in the neighborhood association?

- President:**
 - Lead meetings.
 - Enforce bylaws and covenants.
 - Act as spokesperson.
- Treasurer:**
 - Oversee and manage association finances (reporting, budgeting, collecting dues, writing checks, and preparing financial statements).
- Vice-President:**
 - Assist the president in performing tasks.
 - Be familiar with association's governing documents.
 - Step in when president is unavailable.
- Secretary:**
 - Send out meeting notices.
 - Record meeting minutes and prepare agendas.
 - Notify officers and committee members of their election.
- Appointed-Chair:**
 - Assist the president in specific non-committee tasks.
 - May co-exist with vice-president depending on distribution of responsibilities.
- Committee Chairperson:**
 - Manage committee budget and involvement.
 - Report to the board and membership.
 - Copy association meeting minutes in the minutes' book.
- Board of Directors:**
 - Responsible for establishing and reviewing policies.
 - Oversee major projects.
 - Cannot act individually on behalf of the group.
 - Responsible for calling membership meetings at least once a year.

Why do we want officers?



Introduction to Officer Selection

Good Leaders

- Effective Management of Resources
- Trust, Participation, Change



Introduction to Officer Selection

Good Leaders

- Effective Management of Resources
- **Trust, Participation, Change**



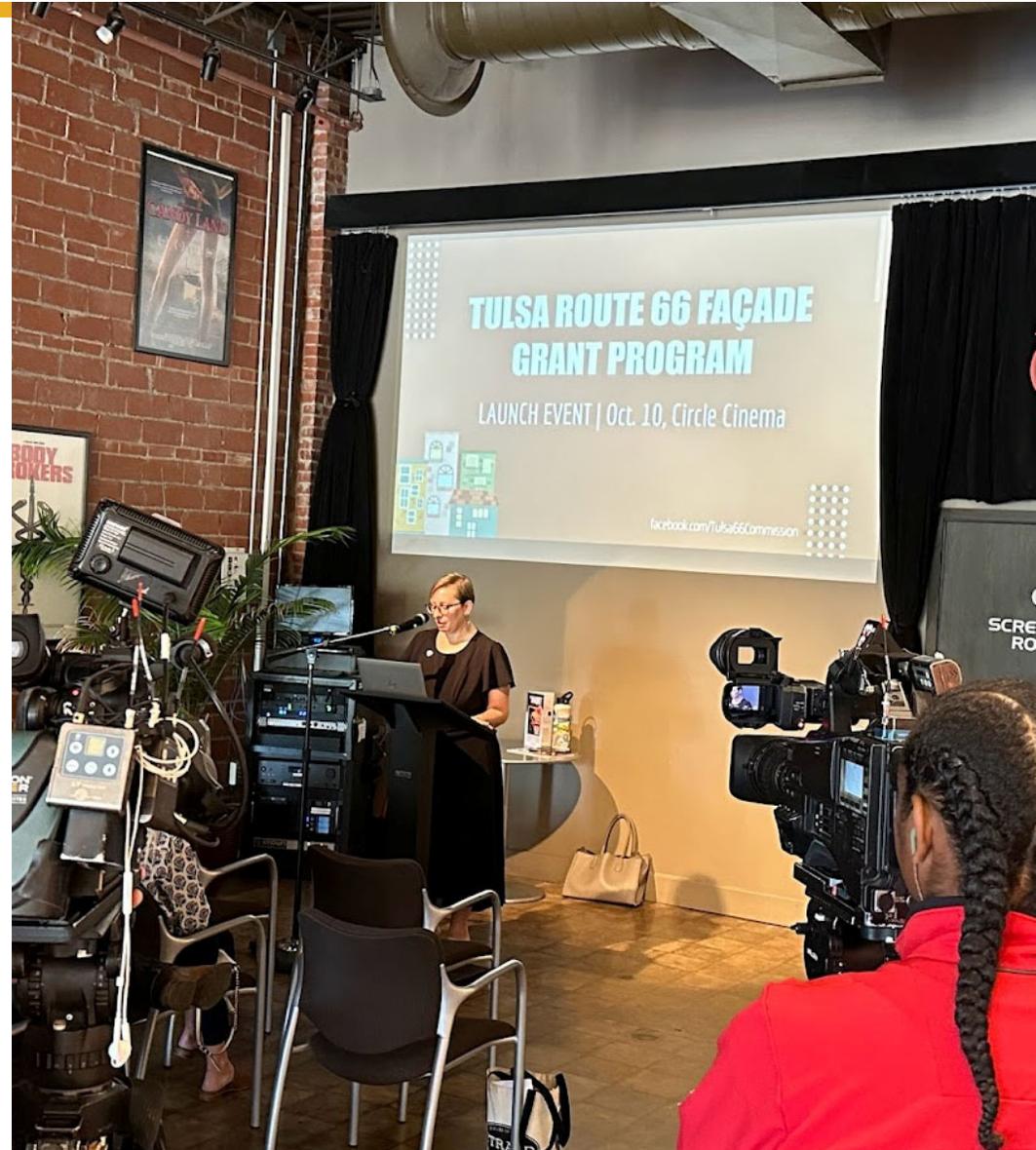
**Activity:
Must, Ought or Nice to have
Round 1**



What Officers Do

President:

- Lead Meetings
- Enforce Bylaws and Covenants
- Act as Spokesperson



President:

- Lead Meetings
- Enforce Bylaws and Covenants
- Act as Spokesperson

Must have

Ought to have

Nice to have



President:

- Lead Meetings
- Enforce Bylaws and Covenants
- Act as Spokesperson

Must have

**Activity:
Must, Ought or Nice to have
Round 2**



What Officers Do

Vice President

- Assist the President
- Familiar with Governing Documents
- Manage when President is unavailable



Vice President

- Assist the President
- Familiar with Governing Documents
- Manage when President is unavailable

Must have

Ought to have

Nice to have



Vice President

- Assist the President
- Familiar with Governing Documents
- Manage when President is unavailable

Ought to have

**Activity:
Must, Ought or Nice to have
Round 3**



What Officers Do

Board of Directors

- Establish Policies
- Oversee Major Projects
- Responsible for Calling
- Meet Annually at least
- Cannot Act Individually



Board of Directors

- Establish Policies
- Oversee Major Projects
- Responsible for Calling
- Meet Annually at least
- Cannot Act Individually

Must have

Ought to have

Nice to have



Board of Directors

- Establish Policies
- Oversee Major Projects
- Responsible for Calling
- Meet Annually at least
- Cannot Act Individually

Nice to have

**Activity:
Must, Ought or Nice to have
Round 4**



What Officers Do

Secretary

- Send Meeting Notices
- Record Minutes
- Prepare Agendas
- Notify Officers and Committee Elections



Secretary

- Send Meeting Notices
- Record Minutes
- Prepare Agendas
- Notify Officers and Committee Elections

Must have

Ought to have

Nice to have



Secretary

- Send Meeting Notices
- Record Minutes
- Prepare Agendas
- Notify Officers and Committee Elections

Ought to have

**Activity:
Must, Ought or Nice to have
Round 5**



What Officers Do Ought to have:

Appointed-Chair

- Assist the President
- May Co-Exist with Vice President



Appointed-Chair

- Assist the President
- May Co-Exist with Vice President

Must have

Ought to have

Nice to have



Appointed-Chair

- Assist the President
- May Co-Exist with Vice President

Ought to have

**Activity:
Must, Ought or Nice to have
Round 6**



What Officers Do

Committee Chairperson

- Responsible for Budget/Manpower Needs
- Report to Board and Membership
- Copy Association Meeting Minutes into Minutes' Book



Committee Chairperson

- Responsible for Budget/Manpower Needs
- Report to Board and Membership
- Copy Association Meeting Minutes into Minutes' Book

Must have

Ought to have

Nice to have



Committee Chairperson

- Responsible for Budget/Manpower Needs
- Report to Board and Membership
- Copy Association Meeting Minutes into Minutes' Book

Nice to have

**Activity:
Must, Ought or Nice to have
Round 7**



What Officers Do

Treasurer

- **Oversee and Manage Association Finances**



Treasurer

- Oversee and Manage Association Finances

Must have

Ought to have

Nice to have



Treasurer

- Oversee and Manage Association Finances

Must have

How do we Identify Potential Candidates?



Identifying Candidates

Identify:

- Resident's Recommendations
- Active Participants
- Consensus Builders, Dispute Mediators
- Communicators
- Qualifications, references



Identifying Candidates

Diversify:

- Diverse leadership
- Under-represented groups



Identifying Candidates

Ability to Commit:

- Time Commitment
- Participation
- Address barriers (language, childcare, transportation, etc.)



How do we run an election?



Election Procedures

Develop and Publish:

- Rules
- Timelines
- Procedures



Election Procedures

Develop and Publish:

- Rules
- Timelines
- Procedures

Communicate:

- Flyers, posters, and brochures
- Emails, newsletters, Website
- Community Meetings
- Personal letters or postcards



Election Procedures

Get to know the candidates

- Candidate meetings
- Facilitate a Q&A sessions
- Focus on improving the neighborhood



How do officers transition?



Transition and Onboarding

Support New Leaders

- Transfer files, current projects
- Introduce key contacts
- Overlap period
- Pair new, experienced leaders



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Support New Leaders

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- Introduce key contacts
- Overlap period
- Pair new, experienced leaders

Tell a City Liaison



Process



Process

SELECTING OFFICERS



What's next?



What's next?

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Questions?



THANK YOU

