

# **TO THE POINT**

## **Officer Roles and Responsibilities**



**Council for  
Exceptional  
Children**

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**Updated 12/13/10**

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# 1. OFFICER ROLES AND RESPONSIBILITIES

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## 1.01 GUIDELINES FOR OFFICERS

Unit officers are the foundation of CEC. As the focal points of energy for their members, they help members organize programs and work together effectively. They set goals and establish priorities. They encourage each and every member of their CEC unit to contribute and they acknowledge the efforts of members. Finally, they have pride in CEC and the work of their unit.

### **CEC unit officers:**

- Are CEC members in good standing.
- Are sure that their personal schedule can accommodate the responsibilities of holding an office before assuming the office.
- Participate actively as responsible members of the executive committee.
- Are familiar with the unit's bylaws.
- Read CEC publications, materials, and communications.
- Attend their unit and other CEC meetings whenever possible.
- Answer correspondence promptly and keep complete correspondence files.
- Promptly submit necessary reports and forms.
- Meet all deadlines.
- Are familiar with Robert's Rules of Order, Newly Revised, latest edition, and have a copy to refer to should a problem arise.
- Ensure that new officers are elected in a timely manner to ensure continuity.
- Transmit records, reports, and other materials promptly to succeeding officers and orient new officers.

### **Good leaders:\***

- Initiate action. They start things going and point the direction.
- Delegate responsibilities according to the ability of the people who are to carry them out.
- Use established channels and recognize informal channels.
- Obey the rules. Rules and customs shape the expectations of people.
- Help others whenever and however they can.
- Maintain discipline. They create situations in which the organization's personnel discipline themselves.
- Listen. Listening enables leaders to respond to the needs of others in the organization.
- The ultimate test of leadership, of course, is effectiveness in getting the job done.

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\*Adapted from Fundamentals of Association Management, American Society of Association Executives; Washington, DC.

# 1. OFFICER ROLES AND RESPONSIBILITIES

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## 1.02 ELECTION OF OFFICERS

Specific guidelines for election of officer are delineated in your bylaws and include nomination and election procedures, term of office, elected and appointed positions, etc. These procedures vary somewhat between units in order to meet their specific needs.

Ideally, there should be a slate of nominees who have been selected by a nominating committee. The names of these individuals, each member's vita, and their statement of goals should be made available to all members prior to the election. A newsletter is the simplest way to disseminate this information.

Voting may be done by mail ballot. In this case, the ballot would be mailed along with the aforementioned data. Or voting may occur at a designated meeting. In this case, you may want to address the issue of absentee ballots in your bylaws. Regardless of the method you use, be certain a mechanism is in place that assures only members can vote. Many individuals believe they are current members, yet their membership has lapsed.

Officers need to be elected early enough to provide a smooth transition period. (For more information on transition of officers, see TO THE POINT Section 1.04.)

### **An Election Checklist:**

- Nominating and Seeking Candidates
  - Solicit candidates representative of your total constituency.
  - Ask the person's permission before submitting a prospective candidate's name.
  - Seek a balanced mixture of experience and new unit potential officers.
  - Invite people to participate who display the skills necessary for the particular jobs being sought.
- Providing Candidate Information to Members
  - Document current CEC membership for each candidate.
  - Provide biographical information.
  - Publish candidate information well in advance of the election.
  - Provide an equal forum for all candidates in the material going to the membership.
- Campaigning
  - Establish clear and easy to follow campaign guidelines and timelines and follow them carefully.
  - Be courteous. Remember that you will be working together after the election and wish to continue your positive relationship.
  - Allow candidates equal time and locations for making campaign speeches.
- Voting
  - Establish and follow the guidelines for the voting procedures of your unit.
  - Appoint your election committee to reflect your total unit constituency.
  - Provide a voting place/method convenient to the membership.
  - Schedule the election at a convenient time for the membership.

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# 1. OFFICER ROLES AND RESPONSIBILITIES

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## 1.03 INSTALLATION OF OFFICERS

The installation of officers is a ceremony in which the newly elected officers take their oath of office. It may be conducted individually or collectively. It may be as festive as the unit desires. It can take place at a business meeting, social event, end-of-the-year awards banquet, or anytime the unit thinks it is appropriate. The event should be a positive affirmation of the commitment to CEC's goals and mission.

### **Sample installation ceremony for any unit:**

(Names), you have been duly elected as officers of the (unit) for (year). In choosing you as officers, the members have expressed their confidence in your ability to perform the functions of your office and their faith in you that you will apply yourselves to the work of your particular office with diligence, efficiency, impartiality, and fairness.

It is obvious that by the manner of your performance, the purposes of CEC will either be advanced or impeded. The membership does not require miracles of you, but surely has the right, if you accept this office, to expect that you do your best in fulfilling your responsibilities.

With this in mind, will you, the duly elected officers of the (unit), accept the office to which each of you has been elected? If so, please answer, "I will."

Do each of you promise, in accepting your responsibilities, to perform all the usual functions of your respective offices in accordance with the goals and missions of the Council for Exceptional Children? If so, please answer "I Do."

I hereby declare these officers duly installed as the (year) officers of the (unit) of the Council for Exceptional Children. May you enjoy a productive and successful year!

### **Sample installation ceremony for a state/provincial unit:**

*This ceremony is usually performed by the past president.*

Each officer of the (state/province) Council for Exceptional Children must accept a most important responsibility. Fulfilling the purposes of this organization is a most challenging and demanding one. Listen carefully to these stated purposes:

- The primary purpose of this organization shall be to improve educational outcomes for individuals with exceptionalities.
- It shall encourage and promote research as a means of better understanding the problems related to individuals with exceptionalities.
- It shall foster a close relationship with private and public agencies and other organizations interested in the education and welfare of individuals with exceptionalities.
- It shall promote and support legislation affecting the education and welfare of individuals with exceptionalities.

In requesting individuals to assume responsibilities of office, we recognize that they have been selected through democratic process as persons of high dedication to the principals of this organization.

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Therefore, in accordance with the constitution and bylaws of (state/province) CEC, the following persons are asked to join in this ceremony: (Call all persons to be installed to the platform).

(Name Elected President), you have been elected to the presidency of this unit. Yours is an office that must be carried out with the utmost loyalty, honesty, and dignity. You are the chief executive of (state/province) CEC. You must preside at all meetings of the executive committee and board of directors, as well as at the annual meeting, appoint all committees, cooperate with agencies of similar interests and prepare an annual report.

Will you attempt to discharge these and other duties as required to the best of your ability? (Answer: I will)

(Name Elected President Elect), you have been elected to a most responsible position as president elect. You will serve in the place of, and with the authority of, the president, if he/she is unable to fulfill his/her office. You will gain knowledge of unit procedures and activities during this year to prepare you to fulfill the office of the presidency in the future.

Will you exert every effort possible to aid in the program of (state/province) CEC during the coming year and to assist the president? (Answer: I will)

(Name Elected Vice President), you will serve as a member of the executive committee and serve in the president's place and with the president's authority in case of the absence or disability of the president and president elect. You will also learn the unit's procedures and activities to prepare you to fulfill the office of president elect and then of president.

Will you work closely with the president and president elect to learn and provide assistance? (Answer: I will)

(Name Elected Secretary), your election to the position of secretary places a great deal of responsibility upon you. It is your duty to keep accurate records of all meetings of the executive committee and the board and to preserve these records. You should carry on any written correspondence on behalf of this unit. Your assistance to, and cooperation with, the president, is essential for the success of the organization.

With a full understanding of these obligations, are you willing to assume these responsibilities? (Answer: I am)

(Name Elected Treasurer). The office of treasurer demands absolute accuracy, honesty, and punctuality. An accurate and complete record of all monies received and spent must be kept in acceptable form. Such records must be presented for auditing at the proper time.

Will you accept this most important responsibility and serve honestly? (Answer: I will)

As past president, I will do my utmost to serve in an advisory capacity to the president, executive committee, and board of directors.

I now declare the officers of (state/province) Council for Exceptional Children duly installed to serve until their successors are elected.

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# 1. OFFICER ROLES AND RESPONSIBILITIES

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## 1.04 TRANSITION OF OFFICERS

In order for your unit to continue outstanding work year after year, a plan for the smooth transition of officers is crucial. Each officer must plan prior to, during, and after his/her term of office for effective transition.

### Guidelines for new officers include:

- Before your term of office begins
  - A. Meet with the current officer in the position:
    - Inquire about the role and responsibilities.
    - Ask about activities that are on-going for the job.
    - Inquire about problems of the job and ask about solutions used by the current officer.
    - Seek input into new, targeted activities and tasks.
  - B. Read materials regarding the position.
  - C. Plan and set goals for yourself:
    - Establish goals you would like to accomplish.
    - Prioritize your goals.
    - Establish timelines for meeting your goals.
    - Generate ideas to implement your goals.
- During your term of office
  - A. Keep good records of what you do. Include:
    - Correspondence sent and received.
    - Minutes from meetings.
    - A telephone log.
    - A list of the problems you experienced and the solutions you tried.
    - A list of approaches to your position that worked well.
  - B. Conduct long range planning sessions:
    - Establish program priorities for the following year.
    - Prepare next year's budget.
    - List resources and contact persons used throughout your term.
  - C. Prepare an evaluation of your job in your position.
- Completing your term of office
  - A. Plan a transition meeting with your successor that includes a review of materials and ideas.
  - B. Be available to the new officer at any time you're needed.

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## 1.05 PRESIDENT

The President is elected to direct the affairs of the unit in cooperation with the other members of the executive committee. The success of the administration will be measured by the participation and cooperation secured from officers, committees, and members. The President serves as the chief executive, who guides the way for the unit.

### **Guidelines for the President as administrative officer include:**

- Familiarize yourself with and maintain a working knowledge of CEC.
- Know CEC's requirements for units and ensure that they are met.
- Help to establish good working relationships between CEC and other groups with similar interests, and with other CEC units and CEC Headquarters.
- Meet with the executive committee soon after election.
- Call and conduct a minimum of four executive committee meetings per year.
- Prepare the agenda and distribute it in advance to officers.
- Pool ideas and encourage full and free discussion before decisions are made.
- Appoint all committee chairs with the approval of the executive committee and serve as an ex-officio member of all committees except the nominations and elections committees.
- Recommend to the executive committee needed ad hoc committees and other appointive bodies.
- Evaluate, organize, and carry out any remaining programs initiated by the Past President.
- Delegate responsibilities, supervise, and give assistance whenever necessary.
- See that all officers' responsibilities are promptly and successfully carried out.
- Accept responsibility for the preparation of the budget.
- Approve all appropriate expenditures.
- Provide for the orderly transition of the presidency through the involvement of the President Elect.
- Provide successor with materials, information, and recommendations.
- State/provincial units and divisions: See that names and addresses of new officers are reported to CEC Headquarters annually.
- State/provincial units and divisions: Ensure that the Unit Assurance Form is submitted to CEC annually.
- State/provincial units and divisions: Make sure that updates to the constitution and bylaws are filed promptly with CEC Headquarters.

### **Guidelines for the President as presiding officer include:**

- Consult with officers and committee chairpersons before each meeting to see that all details of the meeting are ready as planned. This duty may be delegated to the President Elect, Vice President, or another officer.
- Preside at all unit meetings or arrange for your designee to preside.
- If a quorum is present, call each meeting to order at the designated time and proceed with the unit's business.
- Follow your agenda.
- Be familiar with Robert's Rules of Order, Newly Revised, latest edition.

### **President's guide to parliamentary procedure:**

- Decisions made by the President are subject to an appeal by any two members; the majority vote of the unit decides the question.
- If the unit has an official parliamentary advisor, the presiding officer may seek the opinion of this person on any questions of parliamentary procedure.
- The chair should state each motion clearly after it has been seconded and before allowing discussion; he/she should also declare the results of every vote taken.
- The chair takes no part in any discussion while presiding. He/She refrains from expressing a personal opinion on questions before the group, and avoids personal bias when giving information to the unit.
- The chair calls upon the President Elect or Vice President to preside if the President wishes to speak to a motion or to leave the chair. Then the President has all the privileges of a member and addresses the presiding officer in the same manner as any other member.
- The chair votes when the voting is by ballot; in other cases, he/she casts a vote only to create or break a tie.
- The chair recognizes a member who has not spoken to the question in preference to one who has.

## **GETTING STARTED AS A UNIT PRESIDENT**

### **Things to consider when beginning your year as president include:**

- Develop, distribute, and maintain an updated list of unit officers and committee chairs.
- Review recent accomplishments to determine areas of member/officer interest and areas of need.
- Meet early in the year with your executive board to set goals and discuss strategies. Check with CEC about the association's goals and priorities so you can develop yours to align with CEC's.
- Meet with officers and other board members to set expectations for the unit and for individual leaders. Try to develop a rapport with each person.
- Check to see if your constitution is up to date. If not, select a committee to recommend revisions.
- Activate a nominations committee with a timeline to ensure easy transition of officers for the next year.
- For state/provincial units and divisions: Take a look at each of your chapters/subdivisions to evaluate their strengths and needs including:
  - A. Officers—current? new to CEC? need additional training?
  - B. Size and general geographic location
  - C. Membership potential
  - D. Their participation in unit events and ways you can interact with their members
- Always:
  - A. Prepare meeting agendas
  - B. Inform members in advance of any presentation you'd like them to make at meetings
  - C. Keep in mind the "average" CEC member...someone who isn't an officer
  - D. Finish each meeting on a high note
  - E. Acknowledge the work of others
  - F. Welcome newcomers—pair them off with other members when possible
  - G. Keep communication positive
- Maintain dated, clear records of conversations, meetings, and plans.
- Communicate frequently with your officers, committee chairs, and members.
- Remember that CEC membership is a priority and that all officers must be members in good standing.

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## 1.06 PRESIDENT ELECT

The President Elect has been selected as the next executive leader of the unit. This individual should carefully observe the duties of the President and assist him/her in any way.

**Guidelines for the President Elect, the officer in training to be the next President, include:**

- Work closely with the President and take on delegated or jointly decided responsibilities.
- Take over for the President when the President is absent, unable to perform duties, or has resigned; preside at meetings in the absence of the President.
- Keep current on all decisions and activities of the unit so that a smooth transition can take place.
- Attend meetings for leadership training and information sharing whenever possible. These events can provide a valuable information base to help in your future role of President.
- Help plan the program of activities for the year.
- Help revise the unit's bylaws as needed.
- Act as an aide to the President.
- Assume responsibilities for administrative details delegated by the President.
- Provide materials, information, and recommendations to your successor.

My President and I have developed this job description for me....

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## 1.07 VICE PRESIDENT

In some units, the Vice President automatically moves up to the President Elect position, and then to President and Past President. This depends on the unit's constitution and bylaws. Many units find that this position provides for continuity.

### **Guidelines for the Vice President include:**

- Work with the program committee and oversee the development and implementation of all unit programs.
- Coordinate the evaluation of unit programs.
- Prepare for your future presidency by learning and participating fully with the president and president elect as they implement their officer roles.
- Participate with other members of the executive committee in unit decision-making.
- Actively seek to establish the needs of the unit members and communicate frequently in a continuous manner with all officers and the membership.
- Offer suggestions for improvement and recommendations for subsequent officers.
- Serve as officer in charge in the absence of the President and President Elect.

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## 1.08 PAST PRESIDENT

The Past President makes many valuable contributions to the CEC unit. Among the most important contributions are "organizational memory" and the ability to provide continuity through the years. This leader:

- Serves as advisor to the unit.
- Chairs the Nominations Committee. This committee:
  - A. Determines which positions are to become vacant.
  - B. Develops a description of each vacant position.
  - C. Calls for nominations from the membership.
  - D. Develops a slate of officers, using the nominations as a basis for the slate or develops a ballot from nominations.
  - E. Conducts the election according to unit bylaws.
  - F. Reports the results of the election to the unit membership.
- Is available to provide information about the unit's activities in previous years and can provide a historical perspective of the unit.
- Provide past materials as well as information and recommendations to the President and Executive Committee.
- Suggest resources—individuals and groups as well as physical materials and environmental settings for the unit to use.
- Assumes other specific duties as determined by the President or the Executive Committee.

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## 1.09 TREASURER

The Treasurer is the financial officer of the unit and serves as the authorized custodian of the unit's funds. The responsibilities of the Treasurer deal primarily with monetary transactions.

### **Guidelines for the Treasurer include:**

- Study carefully all references to dues and finances found in the constitution and bylaws and become familiar with headquarters dues refunding procedures. Refund checks are mailed annually to state/provincial units who have reported current officers.\*
- Keep an accurate and detailed account of all monies received and disbursed. This information should be kept in a permanent book to pass on to successors. Records should include:
  - A. Payments authorized by the executive committee.
  - B. Copies of vouchers, receipts, bank statements, cancelled checks, etc.
  - C. Details of money being handled by other members.
  - D. Receipts of all money received.
- Explore the possibility of becoming bonded.
- Develop a systematic accounting system for vouchers and other records.
- Communicate budget status to unit officers and committee chairpersons at executive committee meetings.
- Communicate budget status to the unit membership at regularly scheduled meetings.
- Submit a financial statement at each unit meeting.
- Serve as chairperson of any finance or fund-raising committee.
- Provide input and information for the preparation of the annual budget.
- After the books have been audited, prepare and submit to the unit a written annual financial statement. For those units that have small budgets, this report may be a report of basic income and expenses.
- Deliver and explain to successor all books, papers, and correspondence pertaining to the office of treasurer.

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\*The rebate check for all members in the state/province is mailed directly to the state/provincial unit. Distribution of refund monies to chapters is determined by the state/provincial unit. Divisions do not receive refunds from CEC Headquarters.

\*\* SAMPLE \*\*

STATE/PROVINCIAL UNIT TREASURER'S INTERIM REPORT

<u>Expenses</u>	<u>Budgeted</u>	<u>Debits</u>	<u>Balance</u>
1. Newsletter	11,000.00	2,767.78	8,232.22
2. President's Expenses	1,900.00	601.93	1,298.07
3. Reg. Representatives	200.00	- 0 -	200.00
4. Communications	50.00	18.05	31.95
5. Executive Board	4,000.00	1,970.63	2,029.37
6. Elections	50.00	- 0 -	50.00
7. Printing	50.00	- 0 -	50.00
8. Leadership Training	200.00	- 0 -	200.00
9. Executive Secretary	25.00	- 0 -	25.00
10. Membership	50.00	94.58	-44.58
11. Conference	25.00	269.30	-244.30
12. CAN	700.00	- 0 -	700.00
13. Awards	200.00	98.00	102.00
14. Mini-grants	900.00	900.00	- 0 -
15. Miscellaneous	200.00	- 0 -	200.00
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TOTALS	19,550.00	6,720.27	12,829.73

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## Explanation of line items in Treasurer's report:

<u>Budget Line</u>	<u>What It Pays For</u>
1. Forum (Newsletter)	- printing/mailing Forum - communications for publishing Forum (phone, postage)
2. President's Expenses	- supplies (folders, staplers, etc.) - travel expenses to CEC leadership training - photocopies of reports
3. Regional Reps	- costs for regional representation work
4. Communications	- communications costs not covered by other items
5. Executive Board	- all expenses incurred in bringing together executive board for a meeting—travel, lodging, food, etc.
6. Elections	- printing/mailing special election ballots
7. Printing	- printing NYS CEC stationery or documents (i.e., vouchers)
8. Leadership Training	- all expenses incurred as a result of Leadership Training Meeting at NYS CEC Convention
9. Executive Secretary	- paid directly to person hired at discretion of President to assist in typing, filing, mailing, etc.
10. Membership	- all activities directed toward increasing members
11. Conference	- total cost of New York State CEC Convention - total cost of International CEC Convention
12. CAN	- CAN business
13. Awards	- awards, plaques
14. Mini-Grants	- special incentive grants
15. Miscellaneous	- seed money and travel expenses/ communications of committee members

Thanks to Deborah Chicorelli (former NY CEC Executive Staff) for sharing this information.

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## 1.10 SECRETARY

The Secretary keeps accurate records of the proceedings of the unit. Prime qualifications for a Secretary are: promptness, accuracy, and thorough knowledge of CEC objectives, policies, and methods.

### **Guidelines for the Secretary include:**

- Help prepare and distribute an agenda, in cooperation with the President and in advance of each meeting.
- Notify the membership of the time and place of all meetings.
- Maintain for reference at each meeting, a copy of unit bylaws, standing rules, accepted order of business, minutes of previous meetings, and lists of all committees.
- Read the minutes of any previous meeting if asked to do so.
- Record all business transacted at each meeting of the unit and of the executive committee, and present the printed minutes for approval at the next meeting.
- Call the meeting to order in absence of President and President Elect/Vice President, unless bylaws specify otherwise, and preside until a chairperson pro tem is elected.
- Conduct all correspondence of the unit except when the executive committee directs another officer to respond in a specific matter.
- Help to count votes when requested by the presiding officer.
- Act as custodian of all records except those specifically assigned to others, and promptly deliver and explain all records to your successor.
- Carry out the duties assigned by the President.

### **Guidelines for taking minutes include:**

- Minutes contain records of all action take by the unit, including:
  - A. The exact wording of every motion.
  - B. The name of the member who introduced the motion (inclusion of the name of the person to second the motion is optional).
  - C. The action taken on the motion.
- What is done by the unit, not what is said by individual members, is recorded.
- Personal opinion and discussion are not included; however, clarifying statements may be needed.
- The Secretary may request the maker of a motion to put the motion in writing if it is long or involved.
- Minutes should be brief and reported in the order in which business is presented in the meeting.
- At the opening of each meeting, the minutes of the previous meeting are read.
- After corrections they are approved.

### **Elements of meeting minutes include:**

- Type of meeting, (e.g., executive committee, general membership, special, etc.).
- Name of unit.
- Date, place, and hour of meeting.
- Officers present and absent, and guests present.
- Statement concerning minutes of previous meeting.

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- All motions (except those withdrawn); points of order and appeals, whether sustained or lost; the name of each member who introduced a main motion (the name of members who seconded motions is optional).

Example of a motion:

It was moved by R. Jones and seconded by D. Clark that the unit donate \$50 to the Special Olympics.  
MOTION CARRIED.

- Program topic, method of presentation, names of participants, important points covered.
- Time meeting adjourned.

**Guidelines for writing correspondence include:**

- Begin a business letter with the subject and state what action is to be taken regarding it.
- Put the purpose of the letter in the first paragraph.
- If a letter is to contain a disappointment to the reader, state the reason for the disappointment first, as a preliminary to the unfavorable news. And, whenever possible, offer a helpful solution.
- Do not be too enthusiastic or ingratiating in a letter. Be very courteous, definite and sincere.
- Write as you would speak.
- Make all letters clear and concise-to the point.
- Try to keep to a three or four paragraph limit.
- Keep paragraphs short—ten lines or fewer. Opening and ending paragraphs especially should be short—four lines or fewer.
- Vary the sentence lengths.
- Answer every question asked in an incoming letter.
- Never write a letter in anger--wait a day!
- Copies of all business letters should be kept on file. Filing systems vary. Whatever the system, arrange letters chronologically in each file—the latest always on the top. When stapling a letter and its answer together, always put the answer on the top. Not only is this chronologically correct, but it immediately tells that the letter has been answered.

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## 1.11 MEMBERSHIP CHAIR

Membership Chairs and the folks on their membership committee are people-people! They believe in CEC and use their lively personalities to let others know why. The committee works to recruit new members; welcomes new members; provides gentle, friendly reminders to members who will soon face a decision to renew; and encourages lapsed members to renew.

It's important to remember that membership development and successful professional programming go hand in hand. The Membership Chair must be concerned not only with recruiting and retaining members, but also with effective planning and delivery of needs-based professional activities to serve member interest; while the other unit leaders must be concerned with both professional programming and supporting an active membership development effort program. Programming is an important element for units: members want to affiliate with a unit that is doing good things for them, the profession, and the students we serve.

### **Guidelines for the Membership Chair include:**

- Organize and chair the membership committee: a group of three or four poised members who feel comfortable contacting other special educators. This can be a combination of long-standing and new members. Newly involved members always seem to be enthusiastic!
- The responsibilities of the membership committee include not only recruiting new members, but also welcoming new members, reminding about-to-lapse members to renew, and encouraging lapsed members to renew. Find out from your predecessor which activities they used that were most successful and the ones that did not work. With your committee, brainstorm new ideas to try. Use this information to plan your program of membership development activities for the year.
- Bring CEC membership materials to every professional function—even if it's not sponsored by CEC. Encourage your officers to do likewise. Whenever special educators get together, there are potential members to recruit! When your supply runs low, print the membership application on the CEC Web site ([www.cec.sped.org](http://www.cec.sped.org)) or contact CEC's Constituent Services Center (toll free at 888/232-7733 or [service@cec.sped.org](mailto:service@cec.sped.org)) to order more.
- Develop a display to showcase your unit. Use this display at your meetings, annual conference, any other meetings where your unit/unit officers are involved.
- At every unit activity, assign members to greet new members. Use name tags when you expect a large number of new faces. Be sure that all guests are invited to join CEC after the program. People are more apt to join when they have been asked.
- CEC updates the membership applications each year (January 1). Be sure that the current application is used in your membership activities, newsletter, conference program, and other publications.
- Request your list of active and/or lapsed members from CEC as needed by contacting CEC Membership Services at [mbrship@cec.sped.org](mailto:mbrship@cec.sped.org). (See TO THE POINT Section 5.10—How to Order Membership Lists.) To fully benefit from your lists:
  - A. Eyeball the list to see if it looks accurate. If an error is found—such as a misspelled name or the omission of a newly recruited member, contact CEC's Constituent Services Center (toll free 888/232-7733 or [service@cec.sped.org](mailto:service@cec.sped.org)).

- B. Immediately send a welcome letter that notes your unit's next program or activity to all new members. Some units invite new members to special social events and others announce new members in their newsletter. Make sure these people know that, if they desire, there are many ways to get involved.
  - C. Note which members have a renewal (expiration) date approaching. Contact these people to remind them about how CEC benefits them as a special educator. During the same conversation or in the same handwritten note, a plug for the next unit event is appropriate. Even if they cannot attend each program, members like to know that CEC is actively doing things in their community or specialty area.
  - D. Call each former member, even though those marked as lapsed have already received three renewal notices from CEC Headquarters through the mail, and remind them about how CEC benefits them as a special educator. Maintaining a positive approach with the person is important. Sometimes the lapsed member is planning to renew and an upbeat phone call is all that's needed as a more personal reminder.
- Keep a record of all activities conducted by the membership committee. Report on these activities as required by your board.
  - Leave good notes and files from your term of office to give your successors a helpful head start. Spend a few minutes gathering thoughts that will help the next Membership Chair, and share these with him or her.

For more information on membership development, see TO THE POINT Section 4.0—Membership Development.

# 1. OFFICER ROLES AND RESPONSIBILITIES

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## 1.12 NEWSLETTER EDITOR

The Newsletter Editor is responsible for the unit's newsletter as well as leadership of the Newsletter Committee. The policy for selection and length of term of office of the Newsletter Editor should be defined by the unit.

**Guidelines for the Newsletter Editor include:**

- Appoint members of the newsletter committee.
- Participate in the process of determining the number of newsletters to be printed, information to be included in newsletters, procedures for submission of information for consideration, and the deadlines to be followed.
- Monitor CEC and other publications for information to be included in the newsletters.
- Acknowledge the receipt of materials and communicate decisions about the publication to contributors of materials.
- Provide the final editing of material for the newsletter.
- Oversee the mechanics of the newsletter being printed and mailed.
- Ensure that the newsletter is issued on time.
- Account for newsletter receipts and expenditures and ensure that operation is within the budget allocated by the unit.
- Place copies of the newsletter in the unit's file.
- Submit a written summary report regarding the newsletter at the end of each term or at the request of the unit.
- Provide an orderly transition process through the sharing of duties and responsibilities with the incoming Newsletter Editor.

For more information on newsletter development, see TO THE POINT Section 3.11.

# 1. OFFICER ROLES AND RESPONSIBILITIES

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## 1.13 CAN REPRESENTATIVE/GOVERNMENTAL RELATIONS CHAIR

The Children and Youth Action Network (CAN) Representative has several objectives. They are to:

- Seek implementation of the governmental affairs policies of CEC at the local, state,\* and federal levels.
- Inform people about governmental, legislative, and political matters.
- Communicate with public policy-makers.
- Inform people of the short and long term effects of an issue so they will support CEC's efforts.
- Teach strategies for effective advocacy to others.

### **Guidelines for the CAN Representative include:**

- Serve as a member of the unit executive committee and as such attend all regularly scheduled meetings as well as all executive committee meetings.
- Provide reports on legislation and other key policy issues at all meetings.
- Read and be familiar with information on governmental affairs from CEC Headquarters and other sources, such as congressional, state or provincial newsletters, as well as copies of bills and journals.
- Disseminate pertinent information to the committee and all unit members via meetings, newsletters, telephone trees and special meetings.
- Stimulate relevant activities by keeping informed about national and state/provincial issues, and forwarding the information to committee and unit members.
- Provide training and assistance to committee and unit members on specific legislative actions needed and provide feedback to members on the results of actions taken.
- Delegate responsibilities to ensure maximum response/action to current issues.
- Suggest and promote follow-through activities.
- Respond to CAN Alerts and all relevant legislative material received.
- Establish personal contact with key policy-makers.
- Maintain contact with the state or division CAN Coordinator and CEC's Department of Policy and Advocacy Services about current national and state issues. (If you are not sure who this person is, please contact CEC Headquarters.)
- Participate in training sessions and meetings to provide input on key legislative issues.
- Interact with other action/advocacy agencies.
- Submit an annual report of the committee's activities to the President for inclusion in the unit's annual report.
- Provide a file of contact persons, materials, suggestions, and recommendations for the next CAN Representative.

For more information on CAN, see TO THE POINT Section 3.08.

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\*Please note: While the purpose of the CEC CAN may be the same, the operation of the network in the U.S. and Canada differs. This Fact Sheet is specific to U.S. CAN coordinators.

# 1. OFFICER ROLES AND RESPONSIBILITIES

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## 1.14 REPRESENTATIVE TO THE CEC REPRESENTATIVE ASSEMBLY

The Representative Assembly is the membership advisory board of the Council. It meets annually during the CEC Convention. The representatives may exchange information and provide feedback on issues through a variety of modes of communication during times other than the meeting time at the annual convention. This allows the Assembly to function as a working advisory body throughout the year.

The Assembly includes two representatives from each state, province, division, as well as two student representatives. Each representative serves a two-year term. Convention registration is a prerequisite to sitting as a member of the Representative Assembly. Each unit representative will possess one vote in the Assembly.

The CEC budget includes provision for equipment, supplies, printing, postage, stenographic service and staff support necessary for conducting the convention meeting. Transportation, meals, lodging costs, and convention registration for individual representatives are borne by their units, their employers, themselves, or any combination thereof.

### **Powers and duties of the Representative Assembly:**

- To identify, discuss, and advise the Board of Directors on positions the Council should take on issues related to the field of special education and related services and to special education as a profession, and to examine the impact these issues have on children and youth with exceptional needs and those who serve them.
- To examine key public policy issues and initiatives and to advise CEC and the Board of Directors in developing policy, direction setting, and decision-making.
- To inform the Board of Directors, CEC units, and all CEC committees regarding membership issues, concerns, needs, and perspectives on initiatives and activities.
- To act as the forum to critically examine prospective ideas, strategic directions, activities, policy initiatives, and other issues for CEC.
- To approve amendments to the Articles of Incorporation, the Constitution and Bylaws, and the CEC policies that affect the privileges of any CEC unit as described in the CEC Policy Manual, Section Two, Part 3, Chapter 02; Chapter 04, para 4; Chapter 06, para. 4; Chapter 07, para. 4; Chapter 08, para. 4; and Chapter 09, para. 4.
- To elect, by majority vote through the use of a secret ballot, all members of the Nominations Committee with the exception of the Immediate Past President and the other two members of the Board of Directors.
- To establish procedures relating to its own membership.
- To conduct awards and recognition activities.
- To remove any member of the Board of Directors for cause by a 2/3 vote of the total membership of the Assembly.
- To act on such other official recommendations from the Board of Directors as may be received and which fall within the purview of the Representative Assembly.

**Guidelines for Representatives include:**

- Serve a two-year term.
- Register for the CEC annual convention in order to sit as a member of the Representative Assembly.
- Participate in meetings of the Representative Assembly.
- Know the history, structure, mission statement, policies and procedures for governance of the Council.
- Use your knowledge of the unit when considering Representative Assembly actions.
- Participate in activities conducted by the state, province or division, especially executive meetings, conferences, etc.
- Communicate information regarding actions by the Representative Assembly to your unit.
- Read all correspondence and other materials and journals received.
- Respond promptly to requests for information.
- Gather materials to pass on to your successor and provide time to explain and discuss.
- Encourage your unit to budget the necessary funds to attend meetings of the Representative Assembly.

# 1. OFFICER ROLES AND RESPONSIBILITIES

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## 1.15 FACULTY ADVISOR

The Faculty Advisor is an important person to any student unit. The Advisor is there to help with transition from one year to the next, to help officers as they learn leadership skills, to guide the officers in planning the budget and program, to serve as a source of information, and to provide support as needed.

### **Officers of student units should remember that your Advisor:**

- Is approachable.
- Is a problem-solver and role model.
- Is familiar with CEC.
- Is available. Advisors volunteer their time because they want to help.
- Should be informed of meetings and be expected to attend.
- Should be asked to approve new projects and ideas to assure that they are consistent with school policy and chapter philosophy.
- Should have regularly scheduled meetings with the Executive Committee to discuss chapter activities.

### **Guidelines for the Faculty Advisor include:**

- Assist in organizing the chapter and recruiting members.
- Check to see that the chapter conforms to the rules and regulations of the school and the state/provincial unit of CEC.
- Be available to officers and members for assistance and guidance at all times. Be sure to post office hours.
- Train student officers about their roles and responsibilities on an ongoing basis.
- Attend all meetings and as many of the activities as possible.
- Sign all membership forms to verify student membership status.
- Be an advocate for CEC membership.
- Answer questions about the CEC organization and operation as well as act as a reference regarding past successes and failures.
- Serve as a resource person for ideas, materials, and community contacts.
- Serve as a sounding board for present or future plans or ideas.
- Serve as a liaison between the chapter and the school faculty and administration. Try to encourage faculty to attend meetings and activities as well.
- Help with problem-solving.
- Inform students of current activities, available scholarships, audiovisual aids, and other resources for dissemination of career information about special education as a profession.
- Keep students informed of professionally-related activities.
- Provide the next advisor with in-service training and a notebook of past records.
- Reinforce the officers when appropriate.

# 1. OFFICER ROLES AND RESPONSIBILITIES

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## 1.16 PARLIAMENTARIAN

Many units authorize the President to appoint a Parliamentarian to serve as an advisor and consultant to the President, other officers, committees, and members on matters of parliamentary procedure.

During a meeting, the role of the Parliamentarian is that of an advisor to the presiding officer and, when requested, to any other member. He/she should also, as inconspicuously as possible, call to the attention of the chair any error in the proceedings or violations of rules which might affect the basic right of a member. He/she should be seated next to the chair so that a quiet consultation can take place as needed.

The Parliamentarian may be asked to explain a point or to give an opinion, but only the presiding officer can make a ruling.

Outside of the meeting, the Parliamentarian can be of much help in the preparation of revisions of bylaws, amendments, and other rules. He/she can assist in the interpretation of procedural requirements and in the proper preparation of various items in the day's order of business (agenda).

When a member serves as a Parliamentarian, he/she retains all his/her rights of membership, but must relinquish voting rights in the meetings. The Parliamentarian should not assume the responsibility for any other position in the organization during his/her term as Parliamentarian.

### **Guidelines for the Parliamentarian include:**

- Advise the President, executive committee, and unit members about the smooth operation of meetings.
- Maintain parliamentary procedure as found in Robert's Rules of Order, Newly Revised, latest edition.
- Provide helpful parliamentary information to members to facilitate their discussions in meetings, which includes how to:

**adjourn** - to end the meeting

**amend** - to change a motion

**committee** - a group of members chosen to a certain task

**debate** - discussion about a motion

**general consent** - accepting a motion without a vote...

**in order** - relevant to the business at hand

**majority** - more than one half of the members

**motion** - a proposal that the assembly take a stand or take action on some issue

**order of business** - business to be considered during a meeting

**quorum** - number of members that must be present to conduct business legally

**Robert's Rules of Order, Newly Revised, latest edition** - manual of procedure for non-legislative assemblies

**second** - a verbal signal from a member that he/she wishes to consider a motion just made

**voting** - means by which motions are accepted or rejected by the assembly

# 1. OFFICER ROLES AND RESPONSIBILITIES

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## 1.17 HISTORIAN

CEC has been developing its rich history since 1922; your unit has been making history since \_\_\_\_\_. Over the years there have been some significant accomplishments, remarkable members and leaders, and historic occasions to preserve. The role of Historian is to see that the richness of these people and events is recorded and stored for use when researching, celebrating, commemorating, and appreciating.

### **Guidelines for selecting a unit Historian include:**

- Appoint a member who has had some experience with the unit, who knows the leaders and members, and is familiar with unit programs.
- If possible, appoint the Historian for a 3-5 year term to maintain continuity.
- The Historian should be a member who will actively seek out information for the unit's archives.
- If selecting a Historian for the first time, the person should be willing to develop a record keeping and filing system that can be used for many years to come.

### **Guidelines for preserving unit history include:**

- Preserve a copy of all agendas and minutes, by year.
- Create a file for all official documents such as organizational application, charter, awards, legal documents, and bylaws.
- By year, collect all unit publications, project descriptions, and publicity on special projects.
- Keep an overview of important dates in the unit's history so that 5-10-15 year anniversaries of these dates can be commemorated.
- Use historical "tidbits" in unit publications to inform members about past unit programs and to develop an appreciation of CEC's rich scope and mission.
- Make the Historian available to respond to requests for historical information from members, other CEC units, CEC Headquarters, and affiliated organizations.

### **Guidelines for maintaining biographical information about special education leaders:**

- Develop a form that is distributed to unit members at least once a year.
- On the form, ask for the name, address and professional position of the person whose merits should be documented.
- Provide room on the form for the following information: A brief biographical sketch of the person including significant contributions to special education, the unit, and the educational profession at large. Be sure to include any publications, honors, highest degree, area(s) of specialization, positions held, and any other interesting data about the person. Also state whether the person is a CEC member and a member of the unit.
- Keep an alphabetical listing and an index of these leaders. Highlight their accomplishments and contributions.

For information on organizing the archives for your unit, see TO THE POINT Section 5.13.