



# Selecting Officers

Department of City Experience



NEIGHBORHOOD  
ACADEMY

# Where are we?

## Getting Organized

- ✓ Introduction
- ✓ Finding a Core Group
- ✓ 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



**Why do we want officers?**



# 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



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- Enforce Bylaws and Covenants
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***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



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***Must*** have

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## 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



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***Must*** have

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## 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

## Communicate:

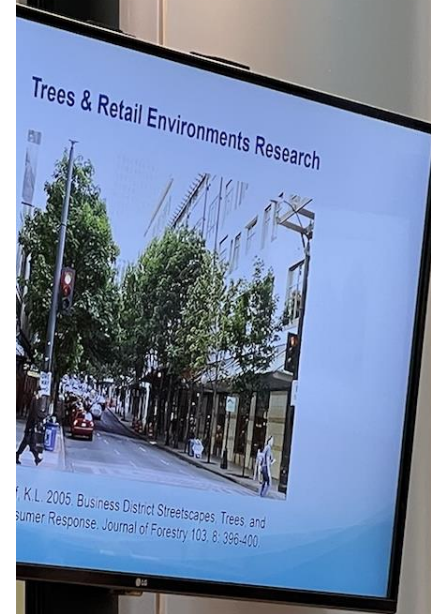
- Flyers, posters, and brochures
- Emails, newsletters, Website
- Community Meetings
- Personal letters or postcards



# 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



# Activity



# 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

# SELECTING OFFICERS



Who would we nominate as \_\_\_\_\_?



President

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



Treasurer

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



Vice-President

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



Secretary

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



Appointed Chair

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



Committee Chairperson

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



Board of Directors

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Must Have

Ought-to-Have

Nice-to-Have

**What's next?**



# What's next?

## Getting Organized

- ✓ Introduction
- ✓ Finding a Core Group
- ✓ Community Workshops
- ✓ Developing Leaders
- ✓ Selecting Officers
- Bylaws
- Running Meetings
- Financial Administration & Compliance

# Questions?



**THANK YOU**

