

Volunteer Chapter Role Description

Secretary

Role Description

Elected volunteer responsible for preparing, maintaining, recording and circulating all records, correspondence, notice of meetings, minutes of meetings and related affairs of the chapter.

Roles and Responsibilities

In order of importance

- Record, edit, maintain and distribute meeting minutes.
- Coordinate and distribute board meeting agendas to board members.
- Attend all board of directors meetings.
- Maintain custody of the approved bylaws, articles of incorporation, charter agreement and amendments thereto, board policies, committee charters and all other nonfinancial records for chapters.
- Notify membership within the period stated in the chapter bylaws before each chapter membership meeting.
- Provide announcements and notifications to membership, directors, auditors and members of committees.
- Receive and dispatch general correspondence.
- Provide records to members and outside organizations that request information.
- Attend chapter membership meetings and events as needed.
- Provide support for membership communication.
- Prepare for, procure and distribute chapter stationery and other printed materials.
- Attend and support the CPCU Society Annual Meeting and Leadership Summit.
- Develop and implement a succession and transition plan.

Role-Specific Skills

In order of importance

- Ability to scribe and record minutes
- Agenda and meeting coordination
- Exceptional composition and grammar
- Knowledge of CPCU Society bylaws and mission and of the insurance industry
- Proficient in email communications
- Knowledge of records retention requirements
- Proficient in copywriting, editing and proofreading
- Proficient use of Microsoft Office tools, including Word, Excel, PowerPoint, Adobe Acrobat and Outlook
- Parliamentary procedures (for example, Robert's Rules of Order)

Leadership Skills

In order of importance

- Active listening
- Excellent communication
- Facilitation
- Time management
- Organization