

# AFE CHAPTER OFFICER TRAINING

An Orientation and Refresher for Chapter Officers and Leaders

**A**FE *Association for*  
FACILITIES ENGINEERING®

# AFE IN GENERAL

- AFE is a 501 (c) 6 not for profit as defined by the IRS
- Incorporated in Illinois.
- Regions are part of AFE.
- Chapters are autonomous associations, bound by their own rules, which **MUST** be consistent with the Charter agreement with AFE.
- The rights and responsibilities as a Chapter are listed within the Charter agreement.

# CHAPTER BACKGROUND

- Chapters should be separately incorporated in their state.
- Chapters should be registered with the IRS, giving them rights and responsibilities under taxation law – and should hold an EIN independent to AFEs.
- Chapters may also choose to be registered with the IRS as a 501 (c) 6, tax exemption (this has differing implications in different states).

# CHAPTERS and AFE

- The relationship between AFE and the Chapters is a legal responsibility to both parties, and it is therefore important to understand the relationship.
- The relationship between a Chapter and the IRS and your State is a legal one, and you are urged to understand that.
- As a Chapter leader you have certain legal as well as administrative responsibilities, only some of which are included here.

# CHAPTER LEADERSHIP

## **Are there requirements for AFE volunteer leadership?**

- A commitment to seeing the organization thrive, along with the willingness and ability to make time, financial, and talent commitments.
- The most important thing to remember when you volunteer to do something in any organization is that others are relying on you to honor your commitments.

# CHAPTER LEADERSHIP

- Following is a quick summary of Chapter Officer positions.
- For a more comprehensive guide to all positions and information on successfully running an AFE Chapter, please refer to the AFE Leadership Guide.
- [www.AFE.org](http://www.AFE.org)

# CHAPTER PRESIDENT

- The Chapter President is the Chief Executive Officer of the organization. His or her role is to lead the officers and committees of the chapter.

# CHAPTER PRESIDENT

What are my basic job duties?

- Lead the members by affecting policies & actions that make the chapter successful.
- Preside at all chapter meetings and the Executive Board & Board of Directors meetings.
- Serve as the ex-officio member of all chapter committees.
- Ensure all Chapter Officers and Committee Chairs perform their duties.
- Serve as the representative to the House of Delegates meeting (currently held at AFE's National Annual Conference, “Facilities America”).

# CHAPTER PRESIDENT (cont'd)

- Listen to your volunteers, and provide them all the resources available to do their jobs successfully.
- Giving them guidance and excellent training now will only ensure a more successful future next year.
- Provide each Committee Chair a written job description detailing their responsibilities to the chapter (drafts are available from AFE.org).
- Important to ensure that the time the volunteer has invested is valuable and worthwhile.

# CHAPTER PRESIDENT (cont'd)

- During your first board meeting, review the goals and objectives you have identified for the chapter.
- What do you want to accomplish during your term of office?
  - What is the status of the chapter?
  - What is the major obstacle facing the chapter?
  - Is there anything within the community or industry that is affecting your chapter members?
  - The chapter's leadership should explore these questions and more so you can assess the immediate needs of your chapter members.

# CHAPTER PRESIDENT (cont'd)

How do I run an Executive Committee meeting?

- Be on time - do not start the meetings late.
- Have an agenda of discussion topics - and stick to them.
- Give attendees at least three weeks advance notice of a meeting date and location.
- Schedule meetings in a consistent pattern (For example: Every other Friday or second Tuesday of the month).
- Contact officers individually before each meeting to identify discussion topics.

# CHAPTER PRESIDENT (cont'd)

How do I run an Executive Committee meeting?

- Email the agenda prior to the meeting date so that attendees can prepare in advance.
- Include an update of AFE Headquarters issues and programs on the agenda at every meeting.
- Include current financial and membership information from the Treasurer and Membership Chair at every meeting.

# CHAPTER VICE PRESIDENT

- Second in command of the organization.
- Assists the President in fulfilling his or her job duties.
- Responsible for directing the actions of the Program Committee.
- Assumes the duties of the President in his or her absence.

# CHAPTER VICE PRESIDENT (cont'd)

- Responsible for directing the actions of the Program Committee.
  - Developing quality tours, educational meetings and valuable networking events for chapter members is the very reason the chapter exists.
  - Committee is responsible for planning and executing the monthly meetings, facility tours, and special events.
- Ensure the Committee is meeting the needs of members and organizing professional and rewarding activities.

## CHAPTER VICE PRESIDENT (cont'd)

- Begin identifying the actions and initiatives you hope to accomplish during your term as President.
- Make every attempt to attend as many committee meetings as possible.
- Ensure that chapter actions are being carried out.
- Spend time evaluating the volunteer officers to determine if changes need to be made for next year.

## CHAPTER VICE PRESIDENT (cont'd)

- Having the initiative to identify problem areas will help ensure that your chapter remains successful.
- Keep your ears open to member concerns, as well as volunteer complaints.
  - It is how quickly and effectively you listen and respond that will ensure that your members continue to support the chapter and renew their dues.



## CHAPTER VICE PRESIDENT (cont'd)

- Take initiative to create new ideas and new programs when a chapter need is identified.

# CHAPTER SECRETARY

- Is responsible for maintaining all chapter records, history, member lists, reports and official business of the executive board.
- Any correspondence to be sent to members, association leaders, or the community-at-large is under the jurisdiction of the Chapter Secretary.
- Handles all orders of chapter stationary, award plaques and other chapter supplies.

# CHAPTER SECRETARY(cont' d)

- Maintains Records - Maintain historical documentation of events held, general meeting data, educational events, social outings and any other business of the chapter.
  - This information will serve a vital role for the officers who succeed you.
  - Good records will provide a quick snapshot of the chapter's activities and how successful and well received various program ideas were.

## CHAPTER SECRETARY (cont'd)

- Keeps Minutes – Minutes should include items discussed during any official Executive Committee meeting and/or board meeting.
- Make sure to highlight any items that required a decision and what the outcome resulted in.
- A synopsis should be included in the next membership newsletter or other communication.

## CHAPTER SECRETARY (cont'd)

- Correspondence - Be a facilitator of general communications.
- If a “Thank You” letter needs to be written and sent to the host of a facility tour, or to a speaker of an event, this is your responsibility.
- These items would be at the direction of the President or Vice President.

# CHAPTER SECRETARY(cont' d)

- The Chapter Secretary must work closely with the membership chair to keep accurate records of new members joining the chapter.
- The Secretary has the primary responsibility for maintaining the chapter membership roster.  
(On-line access to the AFE database is granted to Chapters to assist in this task).

# CHAPTER TREASURER

- Maintains the financial records of the chapter.
- Manages the chapter's funds and makes recommendations to the Board on any expenditure that may put the chapter in financial jeopardy.
- Any correspondence that is of a fiscal related nature must be approved through the Chapter Treasurer.

# CHAPTER TREASURER (cont'd)

- The Treasurer is expected to make a monthly financial report at each chapter meeting.
- The Treasurer makes a quarterly summary at the Executive Board meeting to keep the officers informed of the chapter's current financial status.

# CHAPTER TREASURER (cont'd)

- Remember, you are managing the monies of individuals who have "loaned" dues to the chapter.
- You must consider the chapter a small business, and treat it as such by operating in a fiscally responsible way.
- Record keeping of all expenses and income should be handled through the Treasurer.

# CHAPTER TREASURER(cont'd)

- The Treasurer, in coordination with the Chapter President and Vice President, should be responsible for the establishment of the annual budget.
- A budget is a financial representation of the chapter's annual strategic plan.

## CHAPTER TREASURER (cont'd)

- At the end of the AFE fiscal year, which runs January 1 through December 31, the Chapter Financial Data Form is to be sent in to AFE Headquarters, Attn: Component Relations.
- This paperwork is needed in order for AFE Headquarters to complete its auditing and financial reporting.

# CHAPTER BOARD OF DIRECTORS MEMBER

- Attends scheduled board meetings.
- Assist in developing tours and programs.
- Volunteers to be on committees.
- Attends as many monthly meetings as possible.
- Provides general support and backup to other Chapter Officers in their efforts to provide quality programs and services.

## CHAPTER BOD MEMBER (cont'd)

- Encourages networking among members.
- Get to know the membership, where they work what they do so you can help put people in touch.
- Introduce members to each other.
- Promote the benefits of AFE at chapter meetings.
- Get to know what AFE can offer outside the chapter.

## CHAPTER BOD MEMBER (cont'd)

- Participates in local trade shows and conferences to recruit new members.
- Arrive 1/2 hour to chapter meeting to help set up and cover for anyone coming in late.
- Greet guests and help direct people to the sign up area and during tour.
- Listen to comments from guests and members; bring forward suggestions to improve meetings/events.

# CHAPTER LEADERSHIP GUIDE

**AFE** Association for FACILITIES ENGINEERING.

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MEMBERS ONLY ▾  
[Chapter Leadership Information](#)

Welcome to the Chapter Leadership page. This section was developed to help you in your role as an AFE chapter officer.

Some of the forms on this page you may be familiar with such as the officer report form and the financial form. However, in order for you to view and print these forms you will need to have Adobe Acrobat Reader on your computer. To download the free Adobe Acrobat Reader [Click Here](#).

Form Type	Download links
<b>AFE Expense Reimbursement Process</b>	<a href="#">Expense account process AFE.pdf</a>
<b>AFE National/Regional Travel Fund Expense Report</b>	<a href="#">AFE expense report form.xls</a>
<b>Chapter Reactivation Materials</b>	<a href="#">Reactivate Chapter.pdf</a>
<b>Chapter Secretary – New Officer Form</b> Your first primary responsibility is to send AFE Headquarters the officer report form. This form tells AFE who the new chapter leaders are and ensures they are placed on the mailing list for all national correspondence. This form is due to AFE Headquarters the first month the officers begin their term.	<a href="#">Chapter Officer report.pdf</a>
<b>Chapter Treasurer – Chapter Financial Form</b> Send the Chapter Annual Financial Summary	<a href="#">Financial Data Form.pdf</a>

Available online at  
[www.AFE.org](http://www.AFE.org)

Consider forwarding a copy to all new officers at the beginning of each term and have them review their respective chapters that apply to the position.



**THANK YOU!**