



JGS Toronto

Executive & Volunteer Roles & Responsibilities

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Overview

The Jewish Genealogical Society of Toronto has three major requirements for volunteers:

1. JGS Executive
2. Ongoing Volunteer Positions
3. Temporary Project Volunteers e.g. Cemetery project, Rotenberg Ledger etc.

This document outlines the roles & responsibilities for the first two types.

The purposes of this documentation are to:

1. provide information about volunteer positions for people who are considering volunteering
2. provide information that will help new volunteers fulfill their new roles

The Temporary Project Volunteers will vary depending on the specific projects, so no roles & responsibilities can be defined in advance.

JGS Executive

The JGS Executive is composed of:

1. President
2. Vice President
3. Treasurer
4. Secretary
5. Members-at-Large (4)

1. President

Tasks

Executive Meetings

1. Annually ask Secretary to set up monthly executive meetings with Shaarei Shomayim
2. Create Monthly agenda
3. Review previous minutes sent by secretary (update with any changes)
4. Distribute agenda & minutes prior to the meeting
5. Ensure mail is picked up and respond to inquiries (mailbox)
6. Chair monthly meetings
7. Follow up on any tasks assigned to president
8. Arrange for vice-president (or replacement) to chair meeting if can't attend

General Meetings

1. Annually ask Secretary to set up monthly general meetings with Shaarei Shomayim
2. Prepare announcements for opening of each meeting
3. Make announcements at the meeting
4. Arrange for vice-president (or replacement) to make announcements if can't attend

Follow up

The amount of effort varies depending on the skill level and level of responsibility of the people/committees assigned to these tasks:

1. Financial – check with treasurer that annual reporting/tax paying etc is completed on time; sign cheques; work with treasurer on annual budget
2. Membership – check with membership person that membership renewals are happening, tax receipts, notices being sent out etc.
3. Programming – check with programming committee that programs are ready each month
4. Shem Tov – check with Shem Tov editors that newsletter will be ready each quarter

Other

1. Projects – make suggestions for society projects, solicit ideas, follow up on progress of existing projects
2. Library – approval of book purchases
3. IAJGS – communicate with IAJGS re: annual yearbook, annual conference attendance, changes to executive etc.
4. Miscellaneous: needing to change post box; participation in the Resources of US & Canada book; doing something for the 20th anniversary; discussing/approving equipment purchase; consulting on possible nominees for executive vacancies. (But it doesn't mean the president does these things –can assign to someone and/or discuss at the executive meeting.)

2. Vice President

Tasks

1. Attend monthly Executive Meetings
2. Participate in Executive Meetings as a voting member
3. He or she acts in the absence of the President
4. He or she should assume some of the responsibilities on the President's list after discussing the division of responsibilities with the President.
5. A Vice President should be prepared to be President eventually

3. Treasurer

Skills - Knowledge of Quickbooks

Tasks:

- 1) Attend monthly Executive Meetings
- 2) Participate in Executive Meetings as a voting member
- 3) Deposit receipts
- 4) Pay bills, including remittances to JRI & JewishGen
- 5) Maintain accounting records
- 6) Prepare government returns, including:
 - i) Annual Charities Tax Return (filed by June 30)
 - ii) GST Return (filed by June 30)
 - iii) Annual corporate registration forms (as soon as received)
 - iv) Ontario Registration/Information Return (file as soon as received)
 - v) Any other government information, as required
- 7) Liaison with Bank, external accountants, government, etc.
- 8) Prepare a budget in October/ November for coming year.
- 9) Present treasurer's report at annual meeting in June

4. Secretary

Skills - Ability to take notes

Tasks

1. Attend monthly Executive Meetings
2. Participate in Executive Meetings as a voting member.
3. Record the Minutes of each Executive Meeting.
4. Send minutes to chair for additions and corrections before distribution to all Executive members.
5. Book meeting rooms for all meetings: Executive, General and Special Programs e.g. workshops
6. Secretary will take minutes at General Meetings where elections are held (Dec.) and/or where financial reports are approved (June). Get attendance sheet and attach to these minutes. (There must be at least 10 members present.)

5. Members-at-Large (up to 4)

Tasks

1. Attend monthly Executive Meetings
2. Participate in Executive Meetings as voting members
3. Contribute to discussions at the executive meetings
4. The Programming Chair and the Membership Chair should be Members-at-Large.
5. Be willing to take on responsibilities to assist the Society.

Calendar of Tasks

January

1. Advise IAJGS of election results and contact numbers
2. Update membership form (on website) with any changes to exec
3. Update letterhead with any changes to exec
4. Complete any signing authority changes
5. Membership report and money to IAJGS (must be received by March 1).

February

1. Submit info to IAJGS re: Jewish Genealogy Yearbook (for conference) membership, activities, executive contacts, due end of March; necrology of members who passed away
2. Contact members who failed to renew by personal telephone call or personal emails it makes it easier for people to remember to do it and also provides the address and amount in writing
3. Submit proposed date, speaker and topic to Holocaust Education Week committee.
4. Emails re: conference to membership - two of the future major checkpoints worth announcing are when they add the program to the website and when they are nearing cutoff for early registration

March

1. Advise members that unpaid members will not receive Shem Tov.
2. Payment for postal box.

April

1. Emails re: conference registration, programs
2. Programming meeting for next year.
3. Final contact to unpaid members

May

1. Prepare summary article in the June issue of Shem Tov. It contains a list of the projects we've worked on during the year, speakers at the programs, maybe some plans for the future.
2. Advise unpaid members they are being removed from roster and mailing list.

May/June

1. Name a proxy for the IAJGS annual meeting. In May/June, IAJGS mails a package with information for the president e.g. proxy form for annual meeting attendee if president can't attend, annual meeting agenda, which positions on the IAJGS board are being voted on, if there are any other things that need to be voted on etc. Meeting is one full afternoon.
2. Book meeting rooms for next year.

June

1. Annual general meeting – Treasurer presents financial report/statement.
2. Send program calendar to IAJGS for inclusion on their IAJGS Master Program
3. Treasurer prepares and submits government returns, including:
 - i. Annual Charities Tax Return (filed by June 30)
 - ii. GST Return (filed by June 30)
4. Financial statement to be presented by Treasurer to June general meeting.

October

1. Jewish Genealogy Month - IAJGS has determined that starting in 2008, the month to be celebrated as Jewish Genealogy Month will be Heshvan.
2. Appoint Nominations Chair at executive meeting. Create slate of officers for December elections. Send email to members inviting nominations.
3. Prepare annual budget for next year

November

1. Holocaust Education Week - programming
2. Send e-mail re December elections
3. Web hosting (Black Sun) renewal – every two years

December

1. General meeting and elections
2. Send e-mail re Membership Renewal, notice in Shem Tov etc.

Ongoing Volunteers

The ongoing volunteer positions:

1. Shem Tov
2. Meetings/Programming
3. Membership
4. Librarian
5. Webmaster
6. Society E-mail
7. Snail Mail/Society Postbox
8. Phoners/Phone Coordinator
9. Jewishgen/JRI Charitable Donation Coordinator
10. Photographer

1. Shem Tov

a) Editor

Tasks

1. Encouraging people to submit articles and often assisting them in their presentations
2. Research some articles on his/her own
3. Write some of the columns, e.g. Spotlight, JewishGen - collate data from the various genealogy newsletters, IAJGS online mailings (be sure to get permission and give credit)
4. Proofreading and checking for overall consistency
5. Being a liaison with the layout artist, to ensure the issues are available in time for the meetings.

b) Layout Artist

Tasks

- i) Publisher is used to create a rough layout of each quarterly issue
- ii) Editor suggests which article is the lead article with picture/table and the issue is set up around this.
- iii) The rest of the articles are laid out based on the space, immediacy and congruity to the rest of the issue
- iv) The managing editor and editor check the draft and necessary changes are made.
- v) The finished layout is then converted to pdf to send to the printer and to members directly
- vi) The editor sends the pdf copy to the printer.

Calendar of Tasks

1. Set date for hardcopy (Mar, Jun, Sep & Dec general meetings)
2. Set date for PDF version (should be at least a few days before general meeting)
3. Set deadline for articles – usually one month before the issue date – Mar, Jun, Sep & Dec – note the meetings may **not** be the last Wed. of the month
4. Arrange for pick up of Shem Tov from printer prior to general meeting dates

Timetable:

The printer needs at least a week, and the layout artist needs at least 2 weeks, so we try to work backwards from that; for example, if the meeting is on the 28th of the month, we need to send everything to the printer by the 21st.

To get to that point, we need:

- 2 weeks for layout artist to do the layout - needs all material submitted as word or jpg documents
- Layout artist then sends a draft to editor and managing editor to proofread, and we try to get our corrections to her/him within 2 days
- Layout artist then has about 5 days for corrections, and this should take us to the 21st.

- At this point she/he sends managing editor 2 pdf files:
 - one is put online (which could be done the same day)
 - one (with greyscale) goes to the printer, requesting the issues to be ready in 6 days - one day before the meeting.
- When managing editor has sent out these 2 pdf files, alert someone to pick up the printed copies from the printer on the day before the meeting.

This timetable usually means that we start the whole process at the first day of the month with the meeting in it, and this is the cutoff point for submissions to Shem Tov.

Distribution:

Three distribution lists for Shem Tov

- 1) internet members who receive a pdf file
- 2) members who receive a printed copy
- 3) other associations, institutions and libraries who are sent either pdf or paper copies

At the general meeting a record is also kept of which members pick up their copy of Shem Tov

Following the meeting, get together to fold, address and prepare the issue for mailing (it takes three people about three hours).

Sheets of printed labels cross out those who have already picked up their issue.

Our return mailing address is stamped on the envelopes.

2. Meetings/Programming

a) Programming Committee Chairperson

Tasks

1. Ensure there are enough members of the committee (Chair + 3 or 4 members)
2. Support members, when necessary, in their tasks
3. Organize annual planning meetings, one in May to set the September to December meetings, and one in September to set the January to June meetings
4. Maintain/update list of potential speakers
5. Update and distribute “Guidelines for Program Announcements” to all Committee members
6. Attend Meetings of the Executive
7. Provide list of Programs to the IAJGS website.
8. Ensure that our website contains the most recent and accurate information about our meeting topics
9. Prepare an annual Program budget for submission to the executive for approval

b) Programming Committee Members

Tasks

1. Find/contact speakers and confirm topic, timing and any logistical arrangements
2. Write & distribute announcements for web, e-mail to members, CJN and UJA calendar
3. Consult with Speaker re A/V needs and inform Technical Support person to ensure that A/V requirements are met
4. Ensure room set up is correctly (if different from the standard room & layout)
5. Organize payment and thank you/gift for speaker
6. Introduction, thank you and payment to speaker (or find alternate if appropriate for intro and thank you)

c) Technical Support

Tasks

1. Store and maintain equipment: projector, computer etc.
2. This task should be assigned to Committee member: See 3) above (Consult with speaker re: equipment requirements)
3. Bring equipment to meeting & help speaker setup
4. Test equipment prior to each meeting
5. Format media to make it compatible for the presentation
6. Technical assistance with Powerpoint and equipment for presenters and society members
7. Find a replacement if can't attend a meeting
8. Recommend equipment purchases/upgrades

d) Refreshments

Tasks

1. Store/purchase refreshment stuff: cups, coffee, tea etc
2. Buy kosher cookies and milk for each general meeting
3. Bring refreshments to each general meetings
4. Find a replacement if can't attend a meeting

e) People at the door

Tasks

1. Collect \$5 from non-members
2. Track attendance
3. Distribute & track hardcopy Shem Tov – quarterly. After meeting give attendance sheet to --- for mailing out Shem Tov.
4. Collect membership renewal cheques during renewal period (Dec to Mar) and forward to treasurer
5. Issue temporary receipts for membership fees when paid by cash
6. Collect new membership applications and forward to Membership chairperson
7. Give attendance sheet for Dec. elections and June AGM to secretary
8. Find a replacement if can't attend a meeting

3. Membership

Skills - Familiarity with Microsoft Word, Microsoft Access, Mail Merge program such as World Merge

Tasks

1. Membership
 - Maintain membership database with up-to-date information re contact information, status of membership etc
 - Send out notices for membership renewal
 - Send out tax receipts for membership renewal (create letters, labels) – including tax receipts for Jewishgen & JRI contributions
 - Coordinate membership renewals with treasurer to ensure information is correct
 - Update Shem Tov Editor & Phone Coordinator – they need to know paid-up members
2. Notices to membership
 - Send out all notices, including meetings notices & reminders
 - Send out notice re Shem Tov PDF version (coordinate with Shem Tov editor and webmaster)
3. Shem Tov
 - Prepare address labels for members and associations who receive printed copy

4. Librarian

Skills - Cataloguing knowledge

Tasks

1. Maintain and develop the library's holdings
 - a. Receive journals/newsletters from other genealogical societies – file at the North York Public Library (NYPL)
 - b. Search publishers catalogues and evaluate recommendations of JGS members for books of genealogical interest
 - c. Order books
 - d. Submit invoices to Treasurer for payment
2. Catalogue books:
 - a. Print out 3 copies of author, title, subject data
 - b. File all catalogue data (3 copies) in personal file, public file at NYPL, stack file NYPL
 - c. Shelve processed books at NYPL
3. Compile Acquisition's List
 - a. send to Shem Tov editor for publication in the Shem Tov newsletter
 - b. send to Webmaster to enter onto the website
4. Update Excel spreadsheet for catalogue on website and send to Webmaster
5. Write book reviews and articles related to our library for Shem Tov
6. Display new books and current journals/newsletters at general meetings.
7. Attend Executive meetings and update the Executive on library matters Discuss any major library issues that may necessitate a vote
8. Arrange and co-ordinate tours of the JGS Library and of the NYPL
9. Meet with librarians at NYPL to discuss matters relevant to both libraries
10. Develop creative methods to promote usage of our library
11. Assist JGS members with genealogical research questions

The excel file contains our online catalogue, and is on our website.

5. Webmaster

Skills

Required:

- Basic HTML programming/coding skills (with or without) Microsoft FrontPage 2003
- Microsoft FrontPage
- Password features need Apache Password File or FileMan programming knowledge

Nice to Have:

- Ability to create secure section for Shem Tov/Family Finder etc
- Ability to create an access database and search facility e.g. for Rotenberg Ledger
- Interest in checking out other websites, suggesting potential enhancements

Tasks

1. Create and update web pages, as required
2. Maintain/renew Website account (website hosting). Renew every two years
3. Administer the Website account management Web page for jgstoronto.ca, including changing e-mail address forwarding when new people are elected to the Board
4. Upload Shem Tov quarterly

6. Society E-mail

Skills – access to Internet

Tasks

1. Check Society e-mail daily or at least every few days
2. Delete spam
3. Forward e-mails to the appropriate people e.g. Newsletters to ---
4. Reply to any requests for information/help or forward to someone else if necessary
5. Reply to requests for Rotenberg Ledger pages (need DVD with data on it)
6. Find a backup if necessary

7. Snail Mail/Post Box

Tasks

1. Pick up Mail from postbox prior to Executive Meetings
2. Distribute mail to appropriate people in a timely manner

Jewish Genealogical Society of Canada (Toronto)
P.O. Box 91006
2901 Bayview Avenue
Toronto, ON M2K 2Y6 Canada

8. Phone Coordinator and Phoners

Skills – have a phone

Tasks

1. Maintain list of members without e-mail (received from membership person)
2. Ensure sufficient volunteers for phoning (suggest 5)
3. Phoners phone members without e-mail re: society notices e.g. meeting notices

The telephone committee consists of one co-coordinator and 5 “phoners”.
If one of the phoners is away and/or unable to phone, the co-coordinator fills in. New members who do not have email have their names and phone numbers forwarded to the co-coordinator (by whoever is in charge of new membership) who then assigns this to one of the phoners.

When the co-coordinator receives an email announcing the date, etc. of the next meeting, this is then summarized and forwarded by email to the committee (even though they have already received the same notice). It is sent approximately 2 weeks before the meeting and is a reminder to contact their list. As the phoners do not want to be phoning more than once a month, notices containing all the relevant meetings for that month are appreciated.

9. Jewishgen/JRI Poland Charitable Donations Coordinator

Tasks

1. Receive mail with Jewishgen and/or JRI donations (sent directly to --- address)
2. Enter full details to an Excel tracking file which includes dates, amounts, senders mailing details, and beneficiary
3. When a contribution comes in
 - For JRI report to ---
 - For JewishGen report to ---
4. Bank once a week as required.
5. Upon depositing, report by email to Treasurer. The current reporting format is amount, sender's name, and beneficiary (as well as date of deposit and total deposit).

Tracking file is available at any time. It might be a good idea to send it to other parties upon updating so that if ever lose the file (through computer issues) other people have current copies.

NOTE: If person changes need to provide Bank with letter informing them of change of depositor information.

10. Photographer

Skills – use a digital camera

Tasks

1. Take photos at meetings and events for our website, Shem Tov (and store as archival material about the society)