

JGS TORONTO – Roles & Responsibilities

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JGS Toronto

Executive & Volunteer Roles & Responsibilities

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Date: April 2008

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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.

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JGS Executive

The JGS Executive is composed of:

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

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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.)

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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

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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

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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.

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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.