

# Leadership Manual

LEADERSHIP MANUAL

*Idaho Financial Literacy Coalition*



Printed on March 20, 2009 by the Idaho Financial Literacy Coalition.

This Manual is intended for the use and training of the members and other participants in the Idaho Financial Literacy Coalition.

Copyright © 2009 by the Idaho Financial Literacy Coalition

All rights reserved. No part of this book may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying, recording, or by any information storage and retrieval system without permission in writing from the Publisher.

Published in the United States of America in 2009  
by the Idaho Financial Literacy Coalition.

JumpStart

## POSITION DESCRIPTIONS FOR COALITION OFFICERS, BOARD MEMBERS AND REGIONAL COMMITTEE LEADERSHIP

### POSITION: President

SCOPE: This Position Description is designed to provide a clear understanding of the working relationships among the core competencies, skills, assigned functions, and work requirements of the position. It should not be interpreted as an all inclusive representation of every possible task or duty that may need to be accomplished.

STATUS: Volunteer

CLASSIFICATION: Officer

APPROXIMATE TIME COMMITMENT: 1-5 hours per week with infrequent speaking engagements and conferences involving more.

TENURE: Approximately 1 year: till the next Coalition annual elections

REPORTS TO: Coalition Board of Directors

DESIRED SKILLS: Strong Personal Finance Skills, Strong Interpersonal Skills, Office Related Skills, Public Presentation Skills, Managerial Skills, Microsoft Office.

EXPERIENCE: 1 year as President-elect and 1 to 2 Years of Membership and Participation in the Coalition

As the principal executive officer of the Corporation, the President is responsible for the following:

- Assist in implementing and supporting the educational mission of the Coalition at every opportunity through the execution of the following duties:
- Supervise and control the business and affairs of the Corporation;
- Identify and develop, in conjunction with the Coalition membership, educational programs and projects according to the Coalition's mission;
- Preside at all meetings of the Board;
  - Collecting input from the Coalition Board members prior to meetings, the President determines the agenda. The President forwards the agenda items, including approximate time required for discussion and the responsible parties, to the secretary;
  - Report to the Board on the state of Coalition and its events, projects and activities;

# Idaho Financial Literacy Coalition

PO Box 1978 ❖ Boise ID 83701  
Tel: (208)378-0200 x 906 ❖ Fax: (208) 685-1058  
IdahoFLC@Yahoo.com ❖ www.IdahoFLC.org



- Identify potential funding opportunities and delegate grant writing processes as appropriate;
- Provide training and guidance to the President-Elect in preparation for officer succession;
- Train with Past President in related duties and responsibilities;
- Co-sign all checks and withdrawals over \$50;
- Collect mail, including payments, from Post Office Box 1978 at the Borah Post Office in Boise approximately twice per month. If the president resides outside of the Treasure Valley, the Board should consider having the Post Office forward the Coalition's mail to the business address of the President;
- Create and/or assign committees and leadership to carry out various Coalition projects. Examples include newsletter, web site, marketing and public relations, and a speakers bureau.

JumpStart

## **POSITION: President-Elect**

SCOPE: This Position Description is designed to provide a clear understanding of the working relationships among the core competencies, skills, assigned functions, and work requirements of the position. It should not be interpreted as an all inclusive representation of every possible task or duty that may need to be accomplished.

STATUS: Volunteer

CLASSIFICATION: Officer

APPROXIMATE TIME COMMITMENT: 1-2 hours per week with infrequent speaking engagements and conferences involving more.

TENURE: Approximately 1 year: till the next Coalition annual elections

REPORTS TO: President

DESIRED SKILLS: Strong Personal Finance Skills, Strong Interpersonal Skills, Office Related Skills, Public Presentation Skills, Managerial Skills, Microsoft Office.

EXPERIENCE: 1 to 2 Years of Membership and Participation in the Coalition

The President-Elect is responsible for the following:

- Assist in implementing and supporting the educational mission of the Coalition at every opportunity through the execution of the following duties;
- Take principle responsibility for the expansion and support of Coalition membership, including networking (phone calls, emails, mailings, visits);
- Become familiar with the duties of the President;
- Assume the duties of the President after the election of the next President-Elect;
- As time, availability and practical opportunity allow, represent the Coalition at regional conferences and events;
- Participate on the Board;
- Assist the President as needed;
- Fill in for the President when the President is absent or unable to perform his/her duties.

## **POSITION: Past President**

SCOPE: This Position Description is designed to provide a clear understanding of the working relationships among the core competencies, skills, assigned functions, and work requirements of the position. It should not be interpreted as an all inclusive representation of every possible task or duty that may need to be accomplished.

STATUS: Volunteer

CLASSIFICATION: Officer

APPROXIMATE TIME COMMITMENT: 1-2 hours per week with infrequent speaking engagements and conferences involving more.

TENURE: Approximately 1 year: till the next Coalition annual elections

REPORTS TO: President

DESIRED SKILLS: Strong Personal Finance Skills, Strong Interpersonal Skills, Office Related Skills, Public Presentation Skills, Managerial Skills, Microsoft Office.

EXPERIENCE: Generally 2 Years as President-elect and President plus 1 or more years of Membership and Participation in the Coalition

The Past President is responsible for the following:

- Assist in implementing and supporting the educational mission of the Coalition at every opportunity through the execution of the following duties;
- Perform duties assigned by the President;
- Substitute for the President-Elect in case of absence or inability to serve;
- Serve as Chair of the Coalition's Events Committee;
- Serve as Chair of the Coalition's Annual Business Meeting;
- If requested by the President, serve as Chair of the Nomination Committee, developing a slate of ideally two or more nominees for each elected office becoming vacant;
- Coordinate the nominations process and the election.

## **POSITION: Secretary**

SCOPE: This Position Description is designed to provide a clear understanding of the working relationships among the core competencies, skills, assigned functions, and work requirements of the position. It should not be interpreted as an all inclusive representation of every possible task or duty that may need to be accomplished.

STATUS: Volunteer

CLASSIFICATION: Officer

APPROXIMATE TIME COMMITMENT: 2 hours per month in meetings plus time to create and send meeting agendas and minutes.

TENURE: Approximately 2 years from election

REPORTS TO: President

DESIRED SKILLS: Strong Personal Finance Skills, Office Related Skills, Microsoft Office.

EXPERIENCE: Ideally 1 or more years of Membership and Participation in the Coalition

The Secretary is responsible for the following:

- Assist in implementing and supporting the educational mission of the Coalition at every opportunity through the execution of the following duties;
- Take minutes of all Coalition Membership and Board meetings;
- Sign Coalition meeting minutes as official Coalition record;
- Distribute preliminary and official Coalition Meeting minutes to Board and Membership;
- Have custody of all legal documents and records of the Coalition and copies of such from Regional Committees;
- Attend—in person, by conference call, or web conference—Board meetings.

## **POSITION: Treasurer**

SCOPE: This Position Description is designed to provide a clear understanding of the working relationships among the core competencies, skills, assigned functions, and work requirements of the position. It should not be interpreted as an all inclusive representation of every possible task or duty that may need to be accomplished.

STATUS: Volunteer

CLASSIFICATION: Officer

APPROXIMATE TIME COMMITMENT: 1-2 hours per week

TENURE: Approximately 2 years from election

REPORTS TO: President

DESIRED SKILLS: Strong Personal Finance Skills, Office Related Skills, Microsoft Office.

EXPERIENCE: Ideally 1 or more years of Membership and Participation in the Coalition

As the principal financial officer of the Coalition, the Treasurer is responsible for the following:

- Assist in implementing and supporting the educational mission of the Coalition at every opportunity through the execution of the following duties;
- Sign all Coalition checks;
- Receive all money due and payable to the Coalition;
- Deposit all money into the Coalition's bank account(s);
- Keep accounts of all Coalition assets, liabilities, receipts and disbursements;
- At Board meetings, provide report of financial activities
- Create and, after approval from President, distribute end of year financial statements at Coalition's Annual Business meeting;
- Propose and coordinate income sources and expenditure requests of all committees;
- Develop with the President the Coalition's annual budget;
- Attend—in person, by conference call, or web conference—Board meetings.

## **POSITION: Regional Committee Chair/Coalition Board Member**

SCOPE: This Position Description is designed to provide a clear understanding of the working relationships among the core competencies, skills, assigned functions, and work requirements of the position. It should not be interpreted as an all inclusive representation of every possible task or duty that may need to be accomplished.

STATUS: Volunteer

CLASSIFICATION: Board Member

APPROXIMATE TIME COMMITMENT: 1-2 hours per week

TENURE: Approximately 1 year: till the next Coalition annual elections

REPORTS TO: President

DESIRED SKILLS: Strong Personal Finance Skills, Strong Interpersonal Skills, Office Related Skills, Public Presentation Skills, Managerial Skills, Microsoft Office.

EXPERIENCE: Ideally 1 or more years of Membership and Participation in the Coalition

The Regional Committee Chair/Coalition Board Member is responsible for the following:

- Assist in implementing and supporting the educational mission of the Coalition at every opportunity through the execution of the following duties;
- Supervise and control the business and affairs of the Regional Committee;
- Help to determine the Regional Committee's vision and activities, according to the Coalition's mission;
- Identify and develop, in conjunction with the Regional Committee membership, educational programs and projects according to the Coalition's mission;
- Preside at all meetings of the Regional Committee;
  - Collecting input from the Regional Committee members prior to meetings, the Chair determines the agenda. The Chair forwards the agenda items, including approximate time required for discussion and the responsible parties, to the Regional Committee Secretary;
- Attend—in person, by conference call, or web conference—Coalition Board meetings
- Report the proceedings of Regional Committee and its events, projects and activities to the Coalition Board;

# Idaho Financial Literacy Coalition

PO Box 1978 ❖ Boise ID 83701  
Tel: (208)378-0200 x 906 ❖ Fax: (208) 685-1058  
IdahoFLC@Yahoo.com ❖ www.IdahoFLC.org



- Identify potential funding opportunities for Regional Committee activities and projects, and work with Coalition President to delegate grant writing processes as appropriate;
- Provide training and guidance to the leadership of the Regional Committee in preparation for leadership succession;
- Encourage Regional Committee membership to send membership payments directly to the Coalition at PO Box 1978, Boise ID 83701;
- Immediately forward any and all payments and monies to the Coalition President by certified mail;
- Create and/or assign sub-committees and leadership to carry out various Regional Committee projects. Examples include events, conferences, marketing and public relations;
- Support the Coalition Officers and assess their performance as needed;
- Assist to recruit and retain members of the Coalition and, more particularly, of the Regional Committee.

JumpStart

## **POSITION: Regional Committee Secretary**

SCOPE: This Position Description is designed to provide a clear understanding of the working relationships among the core competencies, skills, assigned functions, and work requirements of the position. It should not be interpreted as an all inclusive representation of every possible task or duty that may need to be accomplished.

STATUS: Volunteer

CLASSIFICATION: Officer

APPROXIMATE TIME COMMITMENT: 2 hours per month in meetings plus time to create and send meeting agendas and minutes.

TENURE: Approximately 1 year: till the next Regional Committee annual elections

REPORTS TO: Regional Committee Chair

DESIRED SKILLS: Strong Personal Finance Skills, Office Related Skills, Microsoft Office.

EXPERIENCE: Ideally 1 or more years of Membership and Participation in the Coalition

The Regional Committee Secretary is responsible for the following:

- Assist in implementing and supporting the educational mission of the Coalition at every opportunity through the execution of the following duties;
- Take minutes of all Regional Committee Membership and Leadership meetings;
- Sign Regional Committee meeting minutes as official Regional Committee record;
- Distribute preliminary and official Regional Committee Meeting minutes to Regional Committee Leadership, Membership, Coalition President and Coalition Secretary;
- Have custody of all Regional Committee records and forward copies to Coalition Secretary as appropriate;
- Attend—in person, by conference call, or web conference— Regional Committee leadership and membership meetings.

# *Idaho Financial Literacy Coalition*



PO Box 1978  
Boise ID 83701  
IdahoFLC@yahoo.com  
www.IdahoFLC.org