

## WRJ Northeast District – Officer Descriptions

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# District President

## Responsibilities

### WRJ

- Participate in monthly district presidents' calls
- Attend District Presidents' Council and district presidents' meetings
- Collaborate with other WRJ district presidents
- Attend WRJ Board meetings annually
- Attend and represent the district at WRJ Fried Women's Conference and participate as requested
- Support and represent the district with the WRJ YES Fund
- Complete reports as requested
- Read WRJ Yammer and other messages and distribute as appropriate
- Mentor the WRJ Northeast first vice president
- Ensure that the district is the liaison between local sisterhoods/ women's groups and WRJ
- Represent WRJ Northeast District as requested by WRJ

### Northeast District

- Organize and preside at all Northeast District board meetings and executive committee meetings, and plan leadership training opportunities
- Coordinate conference calls as necessary or appropriate
- Supervise all officers of the Northeast District
- Create and maintain a strong partnership with the first vice president to ensure mentorship
- Work with the first vice president and the convention committee to help plan the district convention
- Appoint chairs and committee members for the mandated committees: nominating, budget, and governance, which includes constitution and policies and procedures
- Represent or send a representative to all Northeast District area events
- Collaborate with the treasurer regarding reimbursement procedures
- Ensure that appropriate reports are assigned, collected, read, and distributed

- Ensure that appropriate records are maintained and that materials remain current
- Appoint members to the Northeast District board as appropriate
- Work with first vice president and other officers as appropriate to assign committee chairs
- Be affiliated with WRJ and active in your sisterhood/women's group whenever possible

## **General**

- Mentor and support current Northeast District leadership
- Identify, mentor, and support future district leaders
- Identify, mentor, and support WRJ board members from the Northeast District
- Ensure appropriate personal time to fulfill WRJ and Northeast District responsibilities
- Be a role model with the best interest of the Northeast District and WRJ as primary purposes
- Seek to create consensus and a team environment
- Participate in or remain current in skills enhancement for personal growth

## **District First Vice President**

### **Responsibilities**

- Function as a resource to district leadership
- Attend WRJ Board meetings, District Presidents' Council, and other WRJ meetings and events as appropriate
- Participate in monthly district presidents' calls
- Collaborate with other WRJ district first vice presidents
- Be familiar with WRJ and district resources, materials, and opportunities
- Assist the sisterhood/women's group presidents in a variety of ways, upon request
- Fulfill the obligations of the district president if she is not available
- Supervise the area directors, including coordinating periodic phone calls and providing talking points to the area directors prior to their phone calls to the sisterhood/women's group presidents
- Directly supervise the Northeast District Area Management Vice Presidents
- Directly supervise the Northeast District Convention Committee
- Work with the corresponding secretary to develop and maintain the GEO List of sisterhoods/women's groups
- Create and oversee the area directors' reports and other required reports to the Northeast District
- Ensure training opportunities for area directors
- Work with the area management vice presidents and the president to assist local sisterhoods/women's groups, as necessary
- Prepare reports for all executive committee and board meetings
- Be affiliated with WRJ and active in your sisterhood/women's group whenever possible

## **District Vice President of Area Management and Social Advocacy**

### **Responsibilities**

- Maintain email and/or phone communication with assigned area directors
- Hold Zoom meetings with area directors before and/or after they make sisterhood calls
- Make sure area directors post their reports on Google Docs and notify the first vice president of report status
- Support area directors as they refer their assigned sisterhoods/ women's groups to the appropriate district or WRJ expert
- Support area directors as they refer any problems in their assigned sisterhoods/women's groups
- Support members of the social action committee
- Keep current with postings for advocacy groups on Yammer
- As a member of Reproductive Health & Rights Cohort, participate in cohort calls or listen to recordings
- Work with the social action committee to organize a social action project at the district convention
- Plan and coordinate area events with the area director for all the areas you are assigned
- Encourage participation in area events, and assist the area director in inviting sisterhoods/women's groups and individual members
- Keep records of communication with assigned area directors
- Under the direction of the president, assist with coordination of executive committee and/or board meetings including: securing a hotel; securing a location (local synagogue if possible); ordering food for meals; making the flyer for the meeting; and collecting the money and reservations
- Prepare reports for and attend all executive and board meetings
- Participate in any WRJ calls for area management
- Any other duties as assigned by the president
- Be affiliated with WRJ and active in your sisterhood/women's group whenever possible

## **Kevuda Society – Alumnae Association**

- Support chairs of the Kevuda Society
- Review and edit/update invitation letters to join Kevuda Society
- Send Northeast District pins to members who don't own them
- Maintain membership records, and send updates to corresponding secretary and president for GEO List and NDF List
- Maintain a file record for archives

## **District Vice President of Area Management and Philanthropy**

### **Responsibilities**

- Maintain email and/or phone communication with assigned area directors
- Hold Zoom meetings with area directors before and/or after they make sisterhood calls
- Make sure area directors post their reports on Google Docs and notify the first vice president of report status
- Support area directors as they refer their assigned sisterhoods/women's groups to the appropriate district or WRJ expert
- Support area directors as they refer any problems in their assigned sisterhoods/women's groups
- Plan and coordinate area events with the area director for all the areas you are assigned
- Under the direction of the president, assist with coordination of executive committee and/or board meetings including: securing a hotel; securing a location (local synagogue if possible); ordering food for meals; making the flyer for the meeting; and collecting the money and reservations
- Collaborate with WRJ Vice President of Philanthropy including participation on quarterly department conference calls
- Share information from WRJ Philanthropy calls with the district including the goals discussed on the conference calls, and ensure the district has a plan to meet the goals
- At WRJ Fried Women's Conference, assist with the YES Fund event
- Provide information and lead presentations regarding the YES Fund at area events when requested
- Serve as a YES Fund resource for area directors and sisterhood/women's group presidents
- Coordinate, with the YES Fund committee, the YES Fund event at district convention, including the presentation and the Ask
- Obtain a list of all women who are completing their Lifelines or who have completed their Lifelines, so they can receive their pins. This may be done together with the WRJ representative at convention
- Work with the YES Fund committee to organize the Tribute Tree at district convention
- Prepare reports for executive committee and board meetings as requested by the president

- Organize any YES Fund events as requested by the president for Kallah, area events, executive committee, and board meetings
- Other duties as assigned by the president
- Be affiliated with WRJ and active in your sisterhood/women's group whenever possible

## **District Vice President of Area Management, Kallah, and Camp**

### **Responsibilities**

- Maintain email, phone, and Zoom communication with assigned area directors. Zoom meetings before and/or after calls with area directors
- Make sure area directors post their reports on Google Docs and notify the first vice president of report status
- Support area directors as they refer their assigned sisterhoods/women's groups to the appropriate district or WRJ expert
- Support area directors as they refer any problems in their assigned sisterhoods/women's groups
- Plan and coordinate area events with the area director for all the areas you are assigned
- Chair Kallah with the committee assigned by the president/first vice president
- Encourage participation in area events and assist the area director in inviting sisterhoods/women's groups and individual members
- Keep records of communication with assigned area directors
- Under the direction of the president, assist with coordination of executive committee and/or board meetings including: securing a hotel, securing a location (local synagogue if possible), ordering food for meals, making the flyer for the meeting, and collecting the money and reservations
- Serve as liaison with URJ camps in the district
- Prepare reports for and attend all executive and board meetings
- Participate in any WRJ call for area management
- Any other duties assigned by the president
- Be affiliated with WRJ and active in your sisterhood/women's group whenever possible

## **District Vice President of Marketing and Communications**

### **Responsibilities**

- Participate in WRJ conference calls for the Department of Marketing and Communications; relay all information to the district president
- Serve as a resource for other executive committee members, board members, and sisterhoods/women's groups
- Have knowledge of resources and guides available through WRJ and direct people to the appropriate resources as requested
- Hold the Northeast District pins and distribute at all events
- Prepare reports for district executive committee or board meetings, or as directed by the president
- Other duties as assigned by the president
- Be affiliated with WRJ and active in your sisterhood/women's group whenever possible

### **Eblast**

- Direct and support the team of eblast volunteers
- Assign team members their month to produce eblast (assist with switches if needed)
- Assign executive committee members and/or others their month to produce lead article (assist with switches if needed)
- Add new contacts to the newsletter distribution list, as appropriate
- Monitor email bounces and inform area directors or area director vice presidents of unusable email addresses (permanent delivery errors)
- Inform area directors or area director vice presidents when recipients unsubscribe from our distribution list
- Monitor district email wrjneblast@gmail.com for articles submitted before each deadline – usually, one week before each email is sent
- Check articles – make sure they are appropriate/relevant
- Verify that events to be listed are open to all WRJ members
- Supervise the editing of articles for style (WRJ Style Guide), grammar, and clarity
- Establish overall layout and design of monthly eblast
- Discuss setup of monthly eblast with appropriate team member via email/phone
- Oversee testing by team members, assist with final edits
- Ensure that the eblast is mailed the first Tuesday of the month

## **Facebook, Instagram and Twitter**

- Direct and support the team of volunteers
- Receive articles/pictures from sisterhoods/women's groups via district email or through sharing
- Monitor posts made by our team of volunteers– make sure they are appropriate and/or relevant
- Act as one of the administrators
- Create posts as appropriate

## **Website**

- Direct and support the team of volunteers
- Review articles/pictures/flyers/announcements received via district email
- Monitor WRJ communications and other emails for announcements of particular interest to the Northeast District
- Keep materials on the website up-to-date

## **Yammer Group**

- Add new Yammer members who reside in the Northeast District to the Northeast District Yammer group
- Monitor posts to ensure that they are appropriate and/or relevant
- Reply to posts, when a reply is requested or appropriate
- Add posts for events and announcements of interest to the Northeast District
- Add topics (hashtags) to posts, as appropriate
- Maintain links for our Yammer Group's "Network Resources"
- Maintain links for our Yammer group's "Related Groups"

## District Treasurer

### Objectives

- Monitor the district's financial operations
- Responsibly handle the income and expenses of the District
- Deposit all monies and pay all invoices in timely manner
- Keep the district president and district board informed of all activity
- Supervise and/or work with the membership secretary

### Expectations

- Working knowledge of QuickBooks (or whatever accounting system is used by the district), Excel, and bookkeeping is a necessity
- Keep district notebook/records current with correspondence, results of your efforts, and mailings when appropriate. At the end of your term, turn your notebook over to your successor.
- Cooperate with WRJ in providing any and all requested documents and information for the annual audit. During the time the audit is taking place (generally taking place August-October) the auditors will test our systems by requesting random samples of back-up documentation. If such sampling includes your district, the expected turn-around time is a few days, if possible.
- Attend all district events when possible
- Attend WRJ events when possible
- Present financial reports at district board meetings, conventions, and interims
- Communicate with district president on a regular basis
- Be able to devote the necessary time to fulfill your duties
- Be knowledgeable and able to be the public representative of WRJ
- Develop leadership potential of other board members
- Offer occasional tutorials for sisterhood treasurers at the Northeast District Convention, Kallah, or via webinar
- Be affiliated with WRJ and active in your sisterhood/women's group whenever possible

## **Maintain District Books**

- Receive all monies of the district and maintain the bank accounts
- All checks made out to the district are sent to the treasurer, who deposits the checks in the operating checking account in a timely manner, at least once per week, if possible.
- Checking accounts are to be maintained at an FDIC-insured banking institution.
- Write all checks. Requests for reimbursements and any bills/invoices/ payments are sent with a signed Expense Reimbursement Request and the corresponding bill to the district president who approves the request and forwards to the treasurer for payment. Pay all bills in a timely manner. Retain all backup, including signed approval and receipts, in case needed for annual audit. Records should be kept for up to seven years.
- Reconcile bank statements. Bank statements are received monthly and reconciliations should be kept up-to-date.
- Reports: Bank statements and corresponding reconciliations are to be sent to WRJ monthly, in a timely manner. statement of activities (profit and loss) and statement of position (balance sheet) reports are sent to WRJ annually. Any financial questions or inquires made by WRJ are to be answered in a timely manner and copied to the district president. Also, send statement of activities and statement of position reports to the Budget Committee, the district board as per your bylaws.
- Meet with district financial reviewer at least once per year to review books and checks written, according to your district bylaws.

## **Reporting for Kallah, Area Events, and District Conventions**

- Prepare spreadsheet of the meeting's income and expenses for each event for audit and committee review. Keep this information for three years with the district's financial records.
- Be present on all executive committee, conference calls, when possible. Report on financial status to board members when requested by district president.
- Attend district board meetings and report on financial status of the district
- If applicable, maintain PayPal account (or other credit card processing system) for use by district for all meeting registrations.

When entering information into QuickBooks (or whatever accounting software is used by the district), be sure to record the income by type. Records of any fees charged by PayPal or other processing systems are to be kept.

- For audit purposes, registration lists and/or records of individual payments may be requested to document registration income; if another district volunteer maintains those records be sure to have access to them when/if needed.

### **Member of Budget Committee and/or Finance Committee**

- Meet with Budget Committee annually (may be in person or on a conference call) to prepare and review district budget(s).
- Provide Budget Chair with up-to-date statement of activities and statement of position to compare with budget projections.

### **Miscellaneous**

- For every deposit: be able to provide a copy of the check (the bank keeps copies and can provide them when necessary), copy of dues bill or registration form or spreadsheet, documentation of receipt of funds (e.g., bank statement showing deposit made or transaction report showing a PayPal or credit card payment received by the bank), documentation that it was applied to the income item or fund and purpose indicated by the payer/donor. Be sure to accurately record all information in QuickBooks (or whatever accounting system is used by the District).
- For every expense: be able to provide copy of authorization in writing from your district president or whomever your Policies designates as authorized; original or copy of receipt or invoice being paid; copy of canceled check and/or bank statement (or PayPal/credit card statement) showing funds were released; documentation that the funds taken came from whatever fund or budget line was authorized. Be sure to accurately record all information in QuickBooks (or whatever accounting program is used by the district).

## **District Corresponding Secretary**

### **General Responsibilities**

- Send out periodic correspondence as directed by the president
- Maintain the Northeast District's GEO List including updating names and contact information for local sisterhood/women's group presidents or changes in area directors
- Maintain the distribution list for the Northeast District officers, executive committee, board, and Kevuda Society (alumnae)
- At the WRJ Northeast District Convention, announce the credentials (number of sisterhoods/women's groups, women, and countries represented) at each plenary session
- Be affiliated with WRJ and active in your sisterhood/women's group whenever possible

### **District Meeting Responsibilities**

- Send notices of in-person meetings of the executive committee or board, including agenda and documents and materials needed for each meeting
- Maintain name cards of all board members and distribute at meetings
- Participate in all Northeast District meetings as requested by the president
- Prepare reports of the corresponding secretary activities
- Read/summarize correspondence that has been received since the last executive committee or board meeting

### **Uniongram Responsibilities**

- Send Uniongrams on behalf of the president, executive committee or board, as directed by the president
- At the request of the president, send notices of Uniongram opportunities for a simcha or sorrow, compile the names of participants and send the Uniongram
- Maintain account balances for Uniongram contributions and alert participants when their account balances are running low

## **New Presidents' Welcome Letter and Gift**

- Support volunteers, though these volunteers work mostly with the first vice president, who receive updates from sisterhoods/women's groups regarding administrative changes
- Help edit/review welcome letter

## **District Recording Secretary**

### **Responsibilities**

- Take attendance at all meetings
- Take minutes at WRJ Northeast District conference calls and meetings
- Type minutes and send them electronically to the president of the district for editing
- At the direction of the president, distribute finalized minutes to the appropriate group of women (officers, executive committee or board)
- Keep copies of all minutes as documents of record during your term
- Be affiliated with WRJ and active in your sisterhood/women's group whenever possible

## **District Membership Secretary**

### **Responsibilities**

- Prepare and send out the membership bills to all sisterhoods/women's groups three times a year: October, February, and May. All monies are due to the district by June 15 of the fiscal year. The May bill goes to all sisterhoods/women's groups including those who have already paid their dues. They will be reminded that if they have additional members since they paid their dues, they need to remit for those additional members
- When monies come in, make a copy of the bill
- Record all payments on a spreadsheet on Google Drive, that is shared with the treasurer, district president, and first vice president. The spreadsheet should list the check number, date of the check, amount paid, and the number of sisterhood/women's group members
- Forward all checks received to the treasurer
- Prepare any and all reports that are required by the president to be presented at board meetings
- In consultation with the district president and the Women of Reform Judaism office in New York, keep the membership list in line with WRJ's list
- Keep the label list up to date
- If necessary, communicate with a sisterhood/women's group if there is a question about their payment, etc.
- Keep track of the total membership for the district
- Be affiliated with WRJ and active in your sisterhood/women's group whenever possible

## **District Area Director**

### **Responsibilities**

- Make contact with assigned sisterhoods/women's groups at least three to four times per year
- Maintain email or phone communication with assigned sisterhoods/women's groups as much as possible
- Participate in conference calls with the first vice president and your vice president for area management to obtain talking points for your sisterhood/women's group calls
- Submit area director reports of your sisterhoods/women's groups to your area management vice president by the requested deadline
- Report any change of sisterhood/women's group leadership or contact information to the appropriate district leadership
- Refer assigned sisterhoods/women's groups to the appropriate district or WRJ expert if needed
- Refer any problem in assigned sisterhoods/women's groups to your area management vice president and the first vice president as soon as possible
- Collaborate with your area management vice president and local sisterhood(s)/women's group(s) to organize and run an area event
- Other duties as assigned by the first vice president or president
- Be affiliated with WRJ and active in your sisterhood/women's group whenever possible