



## General leadership responsibilities

In general, ACDIS national does not wish to prescribe specific tasks to the leadership of the local chapters; however, it does expect any elected representative(s) to fulfill certain obligations to its membership and to the national organization.

The leadership should work with the local chapter members to facilitate the educational and networking needs of its membership by:

- ⑤ Establishing appropriate meeting frequency and length to meet members' needs. ACDIS recommends meeting quarterly.
- ⑤ Setting and maintaining a regular meeting calendar and communicating that calendar of events to ACDIS national via the [Online Leadership Request Form](#).
- ⑤ Determining the format of the meetings. Meetings can be conducted via webinar, face-to-face, or some combination of the two.
- ⑤ Assisting event hosts with meeting facilitation by identifying speakers, bringing handouts, filling the agendas, supplying food and beverages.
- ⑤ Acting as a liaison to the national association. This includes keeping ACDIS updated on meetings (via the [Online Leadership Request Form](#)) and bringing any problems to the attention of ACDIS national leadership.
- ⑤ Keeping meeting minutes to insure an adequate record of past meetings, results of votes, etc.
- ⑤ The local chapter leaders should participate in the ACDIS-sponsored local chapter leadership forums (leadership conference calls). These calls are offered on a regular basis to promote networking among chapter leaders, foster chapter-building strategies, and discuss educational ideas and potential meeting topics with other local chapter leaders around the country.

Refer to the basic responsibilities outlined in the [ACDIS Local Chapter Agreement Form](#).

### Responsibilities

The three leaders may take on formal roles such as president, vice president, and secretary of the group or maintain co-leadership roles. Bear in mind certain tasks need to be accomplished by the leadership team, such as:

- ⑤ Someone to host leadership planning calls via conference call or online meeting platform. Invite ACDIS national representatives to these calls as if they are members of the leadership team.
- ⑤ Someone to take and disseminate minutes of the leadership team planning meetings to the entire group.
- ⑤ Someone(s) to help plan the education component including identifying event hosts and speakers.
- ⑤ Someone to help obtain continuing education credits:
  - ACDIS CCDS/CCDS-O credits can be applied for at no cost to the chapter through the [Online Leadership Request Form](#). Note that applications should be submitted at least 30 days in advance of the scheduled meeting to allow adequate time for processing.
  - Credits for nursing, AHIMA, or AAPC must be sought through those organizations.
- ⑤ Volunteers to organize vendors/sponsors if applicable. Chapters should have a vendor policy in place prior to accepting vendor participation.
- ⑤ In-person event volunteers to help with set up, check-in, traffic flow, general chapter questions, and assisting with event hosts.

### Roles

Co-leaders



Co-leadership model gives distinct advantage of having a team of competent people at the helm who, ideally, possess complementary strengths and weaknesses. All of the responsibility of leadership and support functions falls on the co-leaders who determine amongst themselves which member of the team wants to/is able to accomplish given tasks. The co-leaders may do all of the work themselves or ask for volunteer help from membership. Committee structure can come into play here where duties are assigned to certain committees to take some of the burden off the core leaders. In large formal structures, the workload may be too great for the co-leader model.

### **Traditional leadership models**

Many chapter leadership teams default to traditional titles such as president, vice president, secretary, treasurer but there may also be titles such as chair, co-chair, secretary, etc., or a secondary level of leadership such as past-president, president, president-elect.

Traditional leadership model can be established for informal or formal groups, though in smaller, informal groups roles can be combined to lessen the number of individuals needed. In large formal groups, many people are needed to share the load.

### **Committees and subcommittees**

A committee structure may be needed to accomplish additional work such as creating a chapter newsletter, maintaining social media presence, crafting, and reviewing bylaws, and so forth. Committees that might be considered include:

- ⑤ Education/speaker recruitment
- ⑤ Bylaws
- ⑤ Elections/nominations
- ⑤ Communication
- ⑤ Membership
- ⑤ Mentoring
- ⑤ Long-term planning

The functions and responsibilities of these committees can be combined into regular monthly volunteer meetings or subcommittee can meet separately and informed the main group about their activities via meeting minutes.

### **Rotation of roles**

The vice president can be nominated and elected as such or can be the person with second highest votes for president. A new president and vice president can be elected each year, or the vice-president can serve as the president-elect for the upcoming year, moving into the president's role as the president steps back from his or her duties. The vice-president/president elect role has the advantage of preparing the person for the presidency in the next year. The president or leader stepping down from his or her volunteer duties should nevertheless serve as a mentor for the president, vice-president/president elect, and other officers and should be kept in the loop for guidance of the newly slated officers for at least a year following their official term.

In the past-president, president, president-elect model, these individuals take on all functions as officers, and can make a very smooth transition from year to year. A three-year commitment is required for each individual.

For consideration, below are some example duties for each role. Some or all duties may be adopted, other duties may be included, or some could be considered for other offices, shared, or delegated to committees.

### **President**

- ⑤ Presides over meetings and events



- ⑤ Represents organization within and outside the organization
- ⑤ Ensures organization maintains a good image
- ⑤ Oversees actions of other officers and committees
- ⑤ Assists with organizing upcoming meeting
- ⑤ Communicates to national organization issues for discussion or problem that arise
- ⑤ Onboards/trains newly elected officers/leadership volunteers
- ⑤ Provides welcome for meeting and is responsible for agenda and conducts business meeting
- ⑤ Assists with formation of annual budget (if dues/fees are collected)
- ⑤ Participates in ACDIS-sponsored local chapter leadership forums (quarterly conference call)

#### Vice president

- ⑤ Assumes duties of present or other officers in their absence or ability to preside
- ⑤ Assists/supervises with election of new officers
- ⑤ Assists in instillation of new officers
- ⑤ Serves as president-elect
- ⑤ Assists with formation of annual budget
- ⑤ Assists with organizing and executing the membership meetings
- ⑤ Facilitates meeting in absence of president
- ⑤ Participates in local chapter quarterly conference calls
- ⑤ May serve on select committees

#### Secretary (often the secretary and treasurer positions are combined)

- ⑤ Assists president and vice president as requested
- ⑤ Keeps all records and minutes for the chapter
- ⑤ Maintains current roster of members and requests roster updates from ACDIS national via the [Online Leadership Request Form](#)
- ⑤ Produces agenda and takes minutes of all meeting
- ⑤ Sends minutes of meeting to members or posts on website
- ⑤ Sends correspondences on behalf of the chapter or as requested by president
- ⑤ Sends correspondences to members via email or website
- ⑤ Communicates links to chapter members, such as Facebook or webpage
- ⑤ May serve on select committees
- ⑤ Serves as contact person for members
- ⑤ Prepares and send meeting announcements
- ⑤ Keeps attendance log of meetings
- ⑤ Maintains vendor log and communication (if applicable and if not kept by treasurer or other volunteer)
- ⑤ Obtains CEUs for educational offerings (if another volunteer is not assigned to this task)
- ⑤ Serves as point person for national organization for distribution of materials
- ⑤ Participates in leadership forums with quarterly leadership calls

#### Treasurer

- ⑤ Keeps financial records of expenses and income for chapter
- ⑤ Keeps record of members and dues paid
- ⑤ Sends out notices for dues
- ⑤ Prepares and presents treasure's report to chapter
- ⑤ Maintains bank account and makes all transactions with presidents' approval
- ⑤ Assists president as requested



## Parliamentarian

- ⑤ Keeps rules of order
- ⑤ Ensures smooth transition between leadership volunteer rotations
- ⑤ Maintains/oversees bylaws, passwords, and other essential chapter information for the preservation of the group

## Social media chair (if applicable)

- ⑤ Develop, implement, and maintain all strategic social media communications, public relations, outreach, and event activities and materials
- ⑤ Develop a plan to consistently increase visibility and reputability of chapter
- ⑤ Develop and update a chapter social media presence
- ⑤ Work closely with communications chair to update the website (if applicable)
- ⑤ Manage event promotion through social media platforms
- ⑤ Create web content to help recruit new members

## Sample roles

**Note:** The following sample roles were taken from the Florida ACDIS chapter bylaws.

- ⑤ **President:** The president will be responsible for writing and distribution of the quarterly newsletter. They will help organize (along with other officers) the regional quarterly meetings to be held at alternating host sites. They will also be available to answer any ACDIS national questions and serve as the Florida ACDIS regional representative. The president will announce the newly elected officials after the vote count prior the completion of the November meeting. The president will give the official welcome at the quarterly meetings, along with a brief message. The president will assist in the formation of an annual budget.
- ⑤ **Vice president:** The vice president will be responsible for the regional yearly polling questions to be distributed prior to the February meeting, with answers to be distributed at the February meeting. All members may submit questions of interest to the vice president throughout the term.
  - The vice president will assist the president in submitting articles for the newsletter and assist with organization of quarterly meetings. The vice president will also serve as supervisor of elections. They will gather all nominations (one individual per hospital organization), along with a brief summary of individuals qualifications, and distribute to all members prior to the August meeting. The votes will be counted by both the vice president and secretary/treasurer to ensure quality. The vice president will assist in the formation of an annual budget.
- ⑤ **Secretary/treasurer:** The secretary/treasurer will send out annual dues notices after the February meeting and will collect any dues submitted. New members can submit dues at any time throughout the year but will be required to renew at the established date. They will open a bank account for deposit of all monies and submit quarterly financial reports to the president and vice president. They will address the ACDIS chapter members at the quarterly meetings with a financial report and will assist in the formation of an expenditure budget. The secretary/treasurer will also send out the meeting minutes to all active members via email following each quarterly meeting.