



Chapter Officer Training

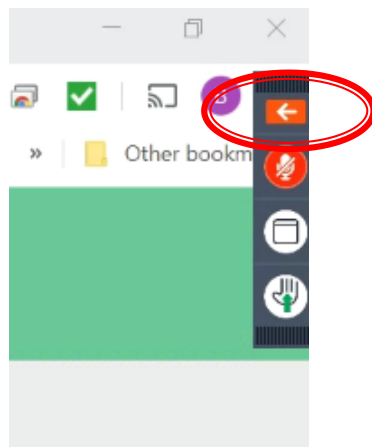
Bruce Donato – K&A First Aid and Safety



We will be starting at 5:00 EDT
Please mute yourself upon entry

Inc., 2021

How to use dashboard



Copyright K & A First Aid, Inc., 2021

2

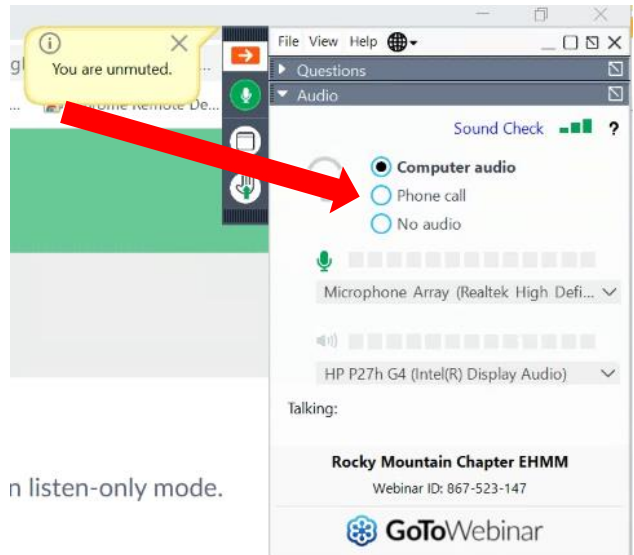
Troubleshooting Audio

If your speaker is not working it may be that your system picked the wrong device. This may reset it.

1. Click on "phone call"
2. Click back on "computer audio"
3. If that does not work use the drop down menu to pick the correct speaker.

If your microphone is not working you can do the same thing. This may reset it.

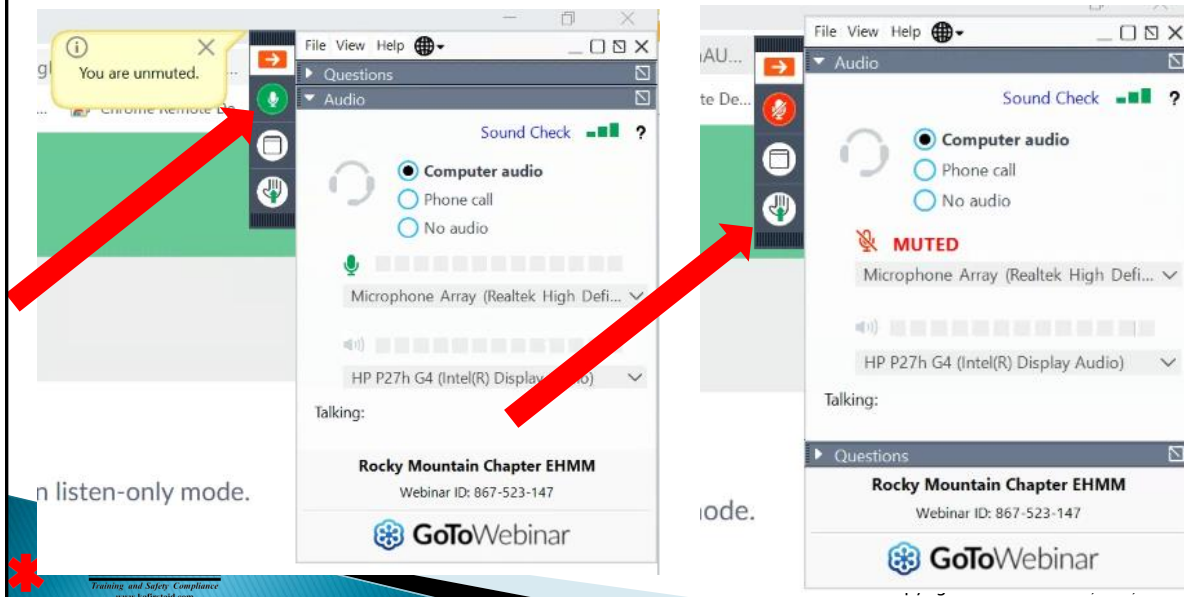
1. Click on "phone call"
2. Click back on "computer audio"
3. If that does not work use the drop down menu to pick the correct microphone.
4. You also can choose "phone call" and call in.



Copyright K & A First Aid, Inc., 2021

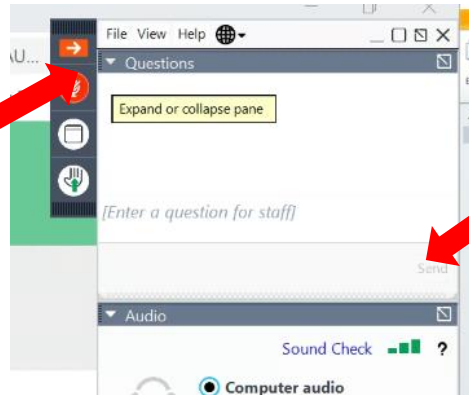
3

How to self-mute/raise hand



4

How to ask questions



AHMP Cyber Chapter Board Members

- ▶ **President Bill Perkins** – New York
- ▶ **Past-President Sarah Henderson** – Utah
- ▶ **Vice President – Susan McCoy** – Kansas
- ▶ **Treasurer Elizabeth Romano** – Idaho
- ▶ **Secretary Heather Tittjung** – Oklahoma
- ▶ **Webmaster– Bruce Donato** – Maryland
- ▶ **Director Heather Fariello** – New York
- ▶ **Director David Onchagwa,** – Qatar
- ▶ **Director Laura Allen** – Maryland
- ▶ **Director Mark Wagher** – Ohio
- ▶ **Josephine Histand Martin** – Pennsylvania
- ▶ **Jason Schmerer** – Florida

Upcoming events

Workshop

Cyber Chapter EHMM Oct. 12 - 15 2021 (Jointly with Eastern Tennessee Chapter)

10/12/2021 - 8:30am to 10/15/2021 - 4:30pm

Cyber Chapter members need to login to get discount. The AHMP Cyber Chapter together with the Eastern Tennessee Chapter are hosting a 4-day Essentials of Hazardous Materials Management Course. The course will run Tuesday October 12 - Friday October 15, 2021 from 8:30 - 4:30 ET. Subject matter...

Diversity, Equity, and Inclusivity in the Workplace - Joint Meeting with WMACSA

10/13/2021 - 5:00pm to 10/13/2021 - 5:30pm

"Biosafety for containment and handling of arthropods: training program using a virtual reality (VR) tool." (Joint meeting with ChABSA)

10/14/2021 - 9:00am to 10/14/2021 - 10:30am

"Biosafety for containment and handling of arthropods: training program using a virtual reality (VR) tool." The design and setup of laboratories intended for the use of pathogens affecting animal and human health and handling of infected live arthropods (e.g. mosquitoes), requires various...

Confined Space - Unique Hazards and Urban Legends (Joint meeting with ASSP NOVA Chapter)

10/14/2021 - 12:00pm to 10/14/2021 - 1:30pm

Bruce Donato of K&A First Aid and Safety, Inc. will review hazards that are unique to confined space entry and work that are often forgotten and he will discuss misconceptions about confined spaces.

7

Continuing Education

- ▶ The Cyber Chapter offers a free service to anyone who registers on the website to track attendance at events and allows participants to download a transcript.
- ▶ Transcripts are updated at least quarterly.

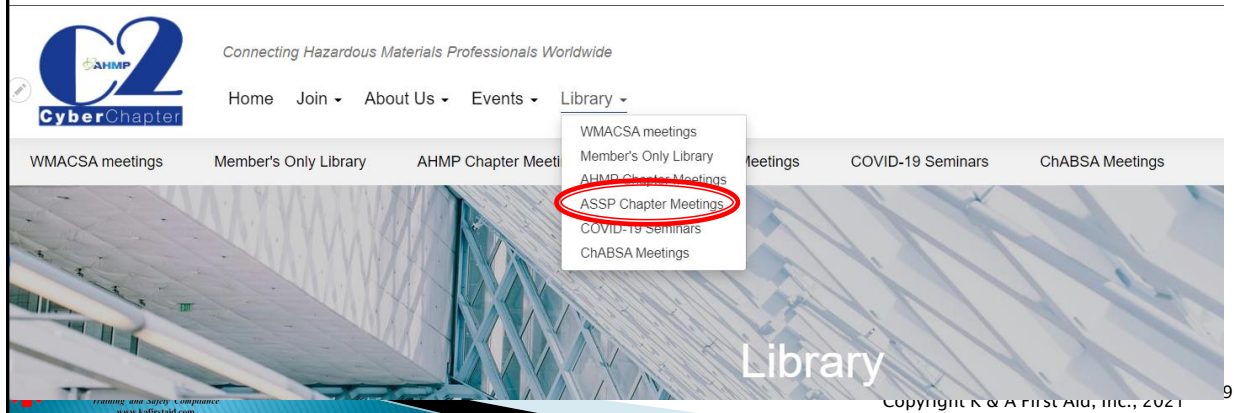


Copyright K & A First Aid, Inc., 2021

8

Slide Deck & Recording

- ▶ Go to www.ahmpcyber.org
- ▶ Library Tab, drop down menu e.g. “ASSP”



Cyber Chapter Membership

- ▶ \$35/year
- ▶ Free attendance to technical seminars
- ▶ Access to all upload technical seminars and slide decks
- ▶ Discounts on CC sponsored workshops



CHAPTER OFFICER TRAINING

Conducted by

Bruce A. Donato, CHMM, CSP, CECD

Past President and Chair, AHMP

Past Chair of AIHA Local Section Council

Past Assistant Regional VP ASSP Region VI

Potomac AIHA, past President, VP, Secretary, Treasurer, Director

ASSP Chapters, past President, VP, Secretary, Director

ChABSA, past Secretary, Webmaster

AHMP-NCC past Secretary, Webmaster

MACSC, Registrar

October 4, 2021



Copyright K & A First Aid, Inc., 2021

Contact Information

Bruce A. Donato, CSP, CHMM, CECD

K & A First Aid & Safety, Inc.

337 Little Quarry Road

Gaithersburg, MD 20878-5705

301-208-0000

bdonato@kafirstaid.com

www.kafirstaid.com



Copyright K & A First Aid, Inc., 2021 12

TRAINING DISCLAIMER

These materials were developed by K & A First Aid, Inc., and are intended to assist employers, workers, and others as they strive to improve workplace health and safety. While we attempt to thoroughly address specific topics, it is not possible to include discussion of everything necessary to ensure a healthy and safe working environment in a presentation of this nature. Thus, this information must be understood as a tool for addressing workplace hazards, rather than an exhaustive statement of an employer's legal obligations, which are defined by statute, regulations, and standards. Likewise, to the extent that this information references practices or procedures that may enhance health or safety, but which are not required by a statute, regulation, or standard, it cannot, and does not, create additional legal obligations. Finally, over time, regulators may modify rules and interpretations in light of new technology, information, or circumstances; to keep apprised of such developments, or to review information on a wide range of occupational safety and health topics, you can visit regulatory web sites such as the Department of Transportation at www.dot.gov or OSHA's website at www.osha.gov.



Copyright K & A First Aid, Inc., 2021

Ground Rules

- ▶ Bruce is not the expert
- ▶ Together we are the experts
- ▶ This is a compilation of several organizations thoughts plus personal experience. It gets better with your input.
- ▶ Interrupt with experiences **and** questions
- ▶ Have fun



Copyright K & A First Aid, Inc., 2021

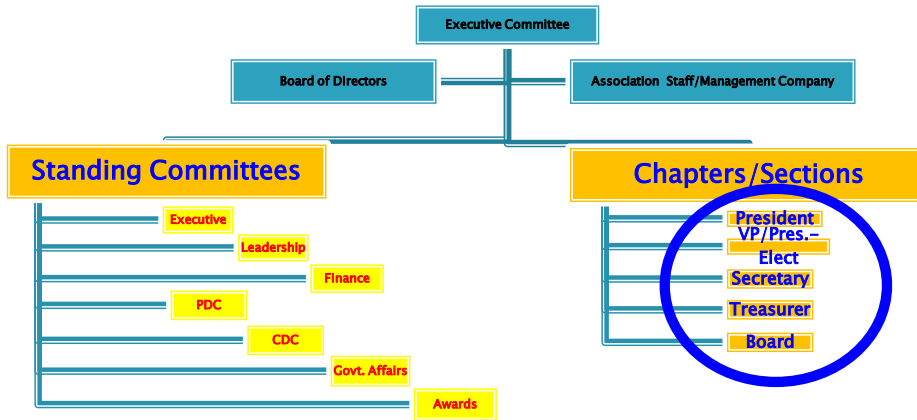
Agenda

- ▶ How officers fit into the big picture
- ▶ Importance of a chapter officer/director
- ▶ General characteristics of a good leader
- ▶ Officer Duties, Responsibilities (and tips and tricks)
 - President
 - VP/President-Elect
 - Secretary
 - Treasurer
 - Webmaster

Agenda (continued)

- ▶ Board member duties
- ▶ Chair duties
- ▶ Continuity Planning
- ▶ Miscellaneous

The Big Picture – Where does a Chapter fit in?



YOU ARE THE KEY !!



A Leader:

L
istens and l
earns from others

E
nergizes the organization

A
cts for the benefit of everyone

D
evelops themselves and others

E
mpowers others to lead

R
ecognizes achievement

WORDS OF WISDOM



USE YOUR POWER WISELY!



**SPEAK FOR
YOURSELF ONLY**



**SIGN WITH CARE
CAUTION W/ CONTRACTS**



CREATE HARMONY

CHAPTER OFFICER DESCRIPTIONS, RESPONSIBILITIES, AND TOOLS & TRICKS.

Chapter President

Chapter President

- ▶ Provides the overall direction for the Chapter
- ▶ Responsible for chairing all of the Chapter and Executive Committee meetings
- ▶ Represents the chapter at the regional/national level.
- ▶ Facilitates 2-way communicates with national level and chapter members.
- ▶ Ensures regulatory items (e.g. taxes) are completed.

Job Description – A Sample

The President shall

- ▶ Be the Chief Executive Officer of the Association;
- ▶ Shall preside at all meetings of the Chapter, Board of Directors, and Executive Committee;
- ▶ Appoint, subject to provisions of the Bylaws, members and chairs of all committees.
- ▶ The President shall serve a “X”-year term of office.

Job Description – Simple

- ▶ Provide Direction
- ▶ Chair BoD meetings and membership meetings.
- ▶ Appoint committee chairs

Specific Tools and Tricks (and pitfalls)

Leadership/Providing Direction

1. Read Chapter Bylaws
2. Understand Roberts Rules*
3. Decide upon specific goals for your Chapter for your term
4. Have an annual planning meeting
5. Schedule your EC and/or BoD meetings in advance
6. Develop a continuity of operations plan
7. Delegate, delegate, delegate
8. Follow-up, follow-up, follow-up

*next slide

Specific Tools and Tricks (and pitfalls)

Roberts Rules (some key points)

1. Meeting Flow

- Call to order
- Approve minutes
- Approve agenda
 - Old business
 - New business
 - Parking Lot
- Close meeting

Specific Tools and Tricks (and pitfalls)

Roberts Rules (some key points)

2. Decision Making

- Main motion made
- Motion seconded
- Discuss as needed
- Call for vote (president can reserve the right to vote to break a tie)
- Pass with a simple majority

Specific Tools and Tricks (and pitfalls)

Roberts Rules (see below)

3. Majorities

- Plenary
- Executive

4. Elections

- Use of the ballot

THE CC HAS A
FORMAL
TRAINING ON
ROBERTS RULES

Specific Tools and Tricks (and pitfalls)

Committees

1. Standing (continuous operation)

- Nominations
- Finance
- Executive

2. Ad hoc and Task Groups

- Awards, membership, conference, etc.

Chapter Vice President President–Elect

Chapter President–Elect

- ▶ In the absence of the president, ensures that all Chapter functions run smoothly
- ▶ Recommended to attend any workshops offered for officers

Vice President/President-Elect

- ▶ In the absence of the president, ensures that all chapter functions run smoothly
- ▶ Serves in absence of the President
- ▶ Recommended to attend workshops
- ▶ Often serves as Chapter Program Chair
- ▶ Assists President as required
- ▶ Carries out other duties as assigned by the President
- ▶ Ensures orderly transition

Vice President/President-Elect

- ▶ Usually Chapter Program Chair
- ▶ Assist President as Required
- ▶ Serve in Absence of the President
- ▶ Other Duties as Assigned by the President
- ▶ Ensure Orderly Transition

Chapter Secretary

Job Description – Sample

The Secretary shall ensure that minutes of the meetings of the Board of Directors and Executive Committee are recorded and retained in a manner consistent with the association's record retention policy; ensure that annual reports of committees are filed with the records of the Association; superintend the registration of proxies, as hereinbefore provided; supervise the conduct of ballots, as hereinafter provided; assure that all notices are given in accordance with the provisions of these Bylaws or as required by law; be custodian of the records of the Association; and, in general, perform all duties incident to the office of Secretary and any other duties as delegated by the Board of Directors or assigned by the President. The Secretary shall serve a XXX-year term of office.

Job Description – Simple

- ▶ Take meeting minutes
 - Record discussions, motions and outcomes
- ▶ Maintain a current officer roster and membership roster
- ▶ Coordinate correspondences to the Chapter membership

Job Description – Another one

- ▶ Issues meeting notices
- ▶ Usually publishes Chapter Newsletter
- ▶ Records and distributes minutes of meetings
- ▶ Maintains permanent Chapter files
- ▶ Assists in preparation of required reports
- ▶ Is key person in Chapter communication
- ▶ Retains custody of the Chapter Charter
- ▶ Ensures orderly transition

Specific Tools and Tricks (and pitfalls)

Taking of Minutes

1. Type as the conversation is going on?
 - Need to be a good typist
 - Display notes as being typed (if feasible)
2. Record and type later.
 - Need to get permission from participants
3. Take cryptic notes
 - Need to type up while fresh in your mind.

Specific Tools and Tricks (and pitfalls)

Participating in Meetings

1. Confirm that your notes are accurate as you take them.
 - Need to be able to interrupt.
2. Pause the taking of minutes to interrupt
 - You will need to have time to record your thoughts after you share your input.

Specific Tools and Tricks (and pitfalls)

Newsletters

1. Do not be responsible for all content?
 - You need support of your executive committee
2. Have a template that you can use.
 - Pay attention to readable on the screen vs. readable in print copy (single column vs. multiple columns)

Chapter Treasurer

Chapter Treasurer

- ▶ Receive/pay bills, keep receipts of all payments, prepare and submit financial reports to the Chapter Executive Committee
- ▶ File 990-N directly to the IRS no later than the 15th day of the 5th month following the end of the Chapter's accounting year (for Chapters going by a calendar year, this is May 15th)

Job Description – Sample

The Treasurer shall

- ▶ be the chair of the Finance Committee;
- ▶ be responsible for the preparation of an annual budget;
- ▶ present an annual financial report;
- ▶ organize simple audits and;
- ▶ shall serve a “X”-year term of office.

Job Description – Simple

- ▶ Manage finances
 - Develop Budget
 - Pay bills
 - Collect payment
- ▶ Create annual report

Job Description – Another one

- ▶ Prepare and manage operating budget for the fiscal year
- ▶ Present reports regarding current and long-term finances to the executive committee and Chapter membership
- ▶ Share opinions on the chapter financial position as an elected officer
- ▶ Supervise the receipt and disbursement of funds
- ▶ Establish and manage funds in an approved depository
- ▶ Attend executive board and chapter meetings
- ▶ Ensure that an annual or biennial audit performed on the chapter financial records
- ▶ Assume the duties of chapter secretary as necessary

Specific Tools and Tricks (and pitfalls)

1. Audit books before assuming duties.
2. Transfer signatures on bank accounts
3. Have transparency in viewing bank records.
4. Set up system for reimbursement (note: PayPal transfers work well).
5. Track deposits and payments.
6. Work with secretary on membership records

Chapter Webmaster

Chapter Webmaster

- ▶ May be an officer (recommended)
- ▶ Needs to be qualified
- ▶ May
 - Manage membership
 - Send out communications
- ▶ Posting of presentations
- ▶ Updating webpage

Chapter Executive Committee

aka “the officers”

Executive Committee

- ▶ Manages Chapter affairs
- ▶ Approves Chapter long-range plan and updates it annually
- ▶ Reviews Treasurer's Report monthly
- ▶ Approves the Chapter budget
- ▶ Receives reports from officers, committees and Chapters and acts on motions
- ▶ Refers business to the board and/or the full membership as required by Chapter Bylaws (*can make decisions on their own*)

Chapter Committees

Possible Other Committees

- ▶ Nominations / Leadership
- ▶ Audit
- ▶ Awards & Honors
- ▶ Chapter Bylaws
- ▶ Government Affairs
- ▶ Hospitality
- ▶ Long Range Planning
- ▶ Membership
- ▶ Newsletter / Website
- ▶ Program

Committee Chairs

- ▶ Are typically nominated by the president and approved by the BoD.
- ▶ Committee Chairs (CC) are excellent resources for continuity of leadership.
- ▶ CC should be invited personally to BoD meetings/calls.
- ▶ Committees should have a charter.
- ▶ CC are not officers of the chapter (unless serving a dual role).

Nominating Committee

- ▶ Selects candidates for offices from the membership
- ▶ Prepares a slate of officers for the coming year and reviews it with the Executive Committee
- ▶ Contacts the candidates and confirms their willingness to serve in that office.

Chapter Continuity Planning

aka Officer Pipeline

Transition Overview & Training

Transition Overview & Training
(Volunteer Retention)

Member Recruitment
(Active Members)

CIRCLE OF SUCCESS

Succession Planning
(Volunteer Recruitment)

Member Engagement
(Involved Members)



Copyright K & A First Aid, Inc., 2021

Skills Volunteer Leaders Need to Succeed

- ▶ Passion
- ▶ Communication Skills
- ▶ Open mindedness
- ▶ Commitment to mentorship
- ▶ Collaborative Nature
- ▶ Strong Self Awareness
- ▶ Understanding of the Mission
- ▶ Vision



Copyright K & A First Aid, Inc., 2021

Attracting New Officers

- ▶ Start by recruiting attendance at regular meetings.
- ▶ Ask to make at least 3 before making any decision.
- ▶ Value the person's time
- ▶ Be specific about the duties and commitments of the position
- ▶ Simplify the tasks as much as possible
- ▶ Don't make a blanket statement – ASK personally!
- ▶ Identify and mentor new leaders at the beginning of your term

Leadership Development Secrets

- ▶ Look for leaders among your membership
- ▶ Match the job to the individual
- ▶ Remove barriers to participation
- ▶ Recognize people for their contributions
- ▶ Ask personally
- ▶ Make it fun!

Membership

Top reasons why people are members:

- ▶ Worthwhile professional development at the local meetings (good content)
- ▶ Networking/Relationship building
- ▶ Mentorship
- ▶ They feel “at home”
- ▶ Worth their time
- ▶ Worth the value

Membership

Top reasons why people discontinue membership

- ▶ Change of profession
- ▶ Unhappy with the local chapter
- ▶ Professional development at the local level is unsatisfactory
- ▶ Local chapter environment is not welcoming
- ▶ Misunderstanding of the benefits of membership

Membership The Keys to Retention

- ▶ Provide a welcoming environment
- ▶ Divide the officers up to network with all members upon arrival to meetings
- ▶ Facilitate networking as much as possible
- ▶ Survey members on a regular basis about their PD desires and speaker suggestions

Improving Meeting attendance-- Identify what they want . . . then give it to them

- ▶ Survey your members by mail or e-mail
 - Meeting times & places (including virtual)
 - Topics of interest
- ▶ Ensure anonymity in the survey
- ▶ Entice with reward for completion
- ▶ Listen to responses
- ▶ React positively
- ▶ Remember members are married to people, not organizations - recognize that as much as possible

Public Statements

- ▶ Local sections should not issue or publish any public statement that uses any form of the name organization on a policy or technical issue (other than issues which primarily affect the local section), without prior consent of the national Board of Directors
- ▶ No public statement on any matter, which purports to represent the opinion of the local chapter, shall be issued or published, unless that statement has been authorized by the local chapter Executive Committee as expressing the opinion of a majority of the members of the local chapter

AIHA Social Media Policy

If a local chapter decides to launch a social media channel (Facebook, Twitter, LinkedIn, etc.) it may need national approval.

A policy should be developed

Sponsor a Student Chapter

- Does your organization have a formal process?
- Are there local educational institutions around (does not need to be a 4-year program or undergraduate program)?
- Can you do this without the national organization?



Copyright K & A First Aid, Inc., 2021

Mentoring Program

- ▶ Developed to assist students and early to mid-career professionals with career development and professional guidance.
- ▶ Can be formal or informal
- ▶ Often can be used for continuing education

Copyright K & A First Aid, Inc., 2021

Preparation For Your Role

- Previous Experiences
- Attitude and Character
 - Willingness to learn
 - Build trust and respect
 - Quickly admit when wrong
 - Good communicators

Preparation For Your Role

- Handling Difficult Situations
 - Always be respectful
 - Base decisions on facts not emotion
 - Keep debate on track
 - Look for solutions that everyone can accept

Emotional Bank Accounts

- Understating the Individual
- Keeping Commitments
- Clarifying Expectations
- Attending to the little things

You Are a Leader!

- You don't need to go it alone.
 - Find your mentors inside or outside your organization
 - By part of LinkedIn Group for Chapter/Section Leaders
 - Please do the same for others



Best Practice! **Questions** **Your Time to Share**