



BNI Secretary/Treasurer Checklist

Overview of Responsibilities

BEFORE the Chapter Meeting Each Week

- Arrive 15 minutes early to the meeting
- Prepare for a successful meeting
 - Have Speaker Rotation List ready to announce upcoming speakers
 - Have Member Bio Sheets ready for today's speakers
 - Have Chapter Membership Dues Report available to remind members who is upcoming on their dues
 - Have current Renewal Applications available to hand to members who are upcoming on their dues

DURING the Chapter Meeting Each Week

- Time the member and visitor Sales Manager Moments using the red and yellow flags
- Announce upcoming speakers for the next six weeks
 - Reminder: \$15-\$20 value door prize should be brought by the Member Showcase speaker each week
 - Introduce each speaker thoroughly and quickly using their Member Bio Sheets
- Announce which members' fees will expire in the next 60 days
 - Hand out the current Renewal Applications during the meeting to those who are upcoming on their dues
 - Announce which members are late or have been dropped
 - Remind members to pay their room dues
- Read the Secretary/Treasurer Report on the cost of membership verbatim when visitors are present
- Announce the amount of money currently in the chapter kitty

AFTER the Chapter Meeting Each Week

- Collect top portion of new applications and payments from the Vice President/Membership Committee
- Collect approved renewal applications and payments that have been approved by the Membership Committee
 - If a renewal is collected after the member's expiration date, collect \$20 late fee from appropriate party
- Submit Supplemental Dues Report to the regional office by regular mail for any monetary transactions
 - Send the top portion of all new and renewal applications and payments to the regional office AFTER receiving approval from Membership Committee and the member is inducted or renewal acknowledged
 - All applications must be accompanied by their appropriate form of payment and a current business card
 - Make sure all applications have the applicant's signature, sponsoring member, and correct chapter name
 - Report dropped members; include their last meeting date and reason for dropping
- Make bank deposits of monies received during the meeting from meal payments and room fees only
 - Make copy of all monies and deposits for your chapter checking account records
- Continue to rotate members on the speaker rotation list
 - Schedule your Assistant Director to bring an educational topic every 6 to 8 weeks
- Enter visitor information in BNINet Plus
 - Collect the weekly Visitor Sign-In Sheets and the President's set of the visitor's business cards
 - Enter visitor's information for first-time visitors in BNINet Plus (see BNINet Plus section)

MONTHLY

- Attend Monthly Leadership Team Meetings
 - Report on chapter roster, Membership Dues Report, chapter kitty
- Submit the Chapter Membership Dues Report to the BNI regional office by the 10th of the month
 - Print the report from the www.bninet.com/bninet website using your customized passwords
 - Mark any changes clearly in the margin, initial and date, then fax back to 503-621-3274.
- Balance the chapter checkbook

Communication with the local BNI support team is critical to the success of your chapter. The Leadership Team will earn one month compensation for successfully completing the above responsibilities and submitting their respective reports to the regional office by the 10th of the month.