

**ORANGE COUNTY CHAPTER OF CALIFORNIA SOCIETY OF ENROLLED AGENTS
FIRST VICE PRESIDENT**

I. POLICY

- A. It is the policy of the Orange County Chapter to elect a First Vice President whose primary function shall be to assume the duties and responsibilities of the President in his/her absence.

II. RESPONSIBILITIES

- A. Assume the responsibilities and perform the duties of the President in his/her absence.
- B. Be the cognizant Officer for the standing committees assigned to this office by the President and serve as liaison between these committees and the Chapter Board of Directors.

III. DUTIES

- A. The First Vice President shall:
 - 1. Be prepared to assume the responsibilities of the President and to perform his/her duties whenever the President is prevented from so doing.
 - 2. Assist the President in carrying out the duties of his/her office.
 - 3. Be cognizant of and monitor the progress of all the standing and task force committees assigned by the President, offering suggestions and making recommendations which will be beneficial to the membership of the Chapter.
 - 4. Recommend the establishment of specific task force committees and their objectives and composition, as appropriate.
 - 5. Coordinate the details, in conjunction with the Second Vice President, of the monthly membership meetings and the annual membership meeting.

IV. PROCEDURES

- A. The First Vice President shall:
 - 1. Assume the responsibilities and duties of the office following installation.
 - 2. Become especially familiar with the Chapter Bylaws, Bylaws of the California Society of Enrolled Agents and of the National Association of Enrolled Agents. Familiarity with all Standard Operating Procedures, especially of those cognizant standing committees, will be extremely beneficial toward the performance of the duties of this office.

3. Establish procedures to monitor the progress of standing and task force committees assigned to this office.
4. As directed by the President, coordinate with the Second Vice President to perform the necessary activities for the conduct of all monthly and annual membership meetings. These tasks shall include, as a minimum, the following:
 - a. Procure all speakers for the monthly CPE meetings and prepare Completion Certificates and Record of Attendance. A CTEC number for the speaker topic is obtained for the CCRA form and a list of all attendees is maintained.
 - b. Provide copies of CCRA forms to all attendees for completion. Attendees keep the "white" copy and return the "yellow" copy.
 - c. Provide copies of Chapter Meeting Evaluation Report to all attendees. Completed forms are collected after the meeting.
 - d. As the Chair of the Public Information and Awareness Committee (PIA), prepare Dinner Meeting announcements and send them to the Los Angeles Times, the Orange County Register, and the Orange County Business Journal for publication. Press releases are also prepared and distributed to the media.
 - e. Prepare Monthly Newsletter announcement for the Newsletter Editor in sufficient time to meet press deadline.
 - f. Assist the President in the preparation of the Chapter Annual Report to the California Society of Enrolled Agents.
 - g. Maintain a record of all activities of the First Vice President and turn over this record to the succeeding First Vice President after his/her installation.

September 1, 1987; Amended 8/21/2001