

**ORANGE COUNTY CHAPTER OF CALIFORNIA SOCIETY OF ENROLLED AGENTS
STANDARD OPERATING PROCEDURES - PRESIDENT**

I. POLICY

- A. It is the policy of the Orange County Chapter to elect a President who shall be the Chief Executive Officer of the Chapter.

II. RESPONSIBILITIES

- A. As Chief Executive Officer of the Chapter, the President shall be responsible to:
1. Provide the leadership essential to the day-to-day operations of the Chapter and to the development of its future plans.
 2. Ensure compliance with the Bylaws of the Chapter, the California Society of Enrolled Agents, the National Association of Enrolled Agents, and other rules and regulations of the Chapter.
 3. Establish and maintain close and continuous cooperation and coordination with the California Society of Enrolled Agents and the National Association of Enrolled Agents.
 4. Protect the rights and interests of all Members of the Chapter.
 5. Initiate such action as may be necessary to ensure the financial viability of the Chapter.
 6. With the Board of Directors, establish Chapter policy and procedures and serve as the spokesperson therefor.

III. DUTIES

- A. The President shall:
1. Preside at all meetings of the general membership and the Chapter Board of Directors.
 2. Serve as ex-officio member of all committees except the Nominating Committee and Examination Committee.
 3. Appoint, with the advice of the vice presidents and approval of the Board, both standing and task force committees.
 4. Ensure that all Chapter records are appropriately kept by the responsible Officers, Directors, and Committee Chairs, duly reviewed and promptly transferred to their respective successors.
 5. Provide annual budget guidance.

6. Issue an official call for the Chapter Annual Election Meeting that includes a report of the Nominating Committee and an official call for the Chapter Annual Installation Meeting.
7. Keep the Officers and Directors advised of all significant matters arising within their purview.
8. Issue a President's Charge to all person(s) elected/ appointed to carry out specific projects.
9. Adhere to the procedures contained in Robert's Rules of Order, Newly Revised, when the Chapter Bylaws do not have precedence.
10. Maintain or enhance the professional standing of the *Orange County Enrolled Agent* (the Chapter newsletter).
11. Require drafts of Chapter Standard Operating Procedures (SOP) as appropriate and maintain a continuing review of existing SOPs and update Chapter Standard Operating procedures as necessary or appropriate.
12. Prepare the Chapter Annual Report to the California Society.

IV. PROCEDURES

A. The President shall:

1. Assume the responsibilities and duties of the office following installation. Coordination with the Immediate Past President will facilitate this transition.
2. Prepare agenda for each Board of Directors meeting and conduct these meetings in accordance with the Chapter Bylaws and Robert's Rules of Order, Newly Revised.
3. In conjunction with the Board of Directors, appoint the following Standing Committees:
 - a. Bylaws
 - b. Finance and Budget
 - c. Membership
 - d. Professional Education
 - e. Long Range Planning
 - f. Public Information & Awareness
 - g. Past Presidents' Advisory
 - h. Legislative Affairs
 - i) Scholarship
4. The following are presently task force committees which may be appointed if deemed appropriate:
 - a. Enrollment Exam Prep Course
 - b. Update Seminar
 - c. Planning Retreat

- d. Speakers' Bureau
- 5. Determine if all correspondence, papers and records of Officers, Directors, and Committees have been turned over to successors. If not, institute action to ensure compliance.
- 6. Ensure that the Board of Directors designate persons bonded by the Chapter to sign checks.

V. GENERAL

- A. Schedule a Year-End Retreat, during which annual budgets are established and reviews conducted to ensure operation within budget constraints. Set forth the President's proposed annual programs to include "seed" money for the Planning Retreat, the Enrollment Examination Class, and any other factors to be taken into consideration during the budget process. Establish deadlines for all Officers and Committee Chairpersons to submit their budget requests to the Budget and Finance Committee. Written, even negative, reports are required. Maintain a record of all expenditures (reimbursed and non-reimbursed) for successor and the Budget and Finance Committee.
- B. Study and become at ease with utilizing and implementing the procedures outlined in Robert's Rules of Order, Newly Revised.
- C. Comply, and ensure compliance, with all other approved Standard Operating Procedures.
- D. Write, or cause to be written, the "President's Message" article for the *Orange County Enrolled Agent* and submit to the editor within established deadlines.
- E. After sufficient time has elapsed since election/appointment, those responsible for preparing and maintaining Chapter SOPs should be instructed to review and submit suggested changes and modifications thereto to the Bylaws Committee for review and approval and for presentation to the Board of Directors for approval.
- F. Write, or cause to be written, "Thank You" letters to those individuals who have been guest speakers at Chapter meetings, update seminars, etc.
- G. A copy of this approved SOP, and all other approved Chapter SOPs, shall be delivered to the Secretary who will establish and maintain the "Master File." (Copies may be in printed format or on computer disks.) Copies are to be provided each successor with "turnover" files.

