

PCBL EXECUTIVE SECRETARY TASKS

Support for Board Meetings (quarterly)

1. 3 weeks prior to meeting email notice of location & directions, agenda, and minutes of prior meeting if not supplied by others
2. Take reservations and order lunch
3. Bring updated Board roster, agenda, minutes and/or other print materials to meeting; bring by-laws; assist with minutes; other tasks as needed

Other PCBL meetings or institutes

1. Mailing announcements to members in August or September
2. Provide packets as directed by Board for institutes & annual meeting
4. Accept registrations
5. Coordinate with chair and treasurer regularly.

Correspondence, etc.

1. Check Yahoo & post office box regularly
2. Answer 1-800 phone when called
3. Process and send renewal letters in November to members.

990 Tax filing

1. By September 30 verify list of SUBs for IRS
2. In November confer with Assistant Treasurer and accountant regarding year-end report
3. In late November prepare report packets for Affiliates
 - a. Produce mailing labels for all Affiliate members
 - b. Print labels with name & EIN for forms
 - c. Print letters
 - d. Work with Asst. Treasurer to stuff envelopes
 - e. Mail year end reports; post to website
4. As reports are submitted by Affiliates, record date of payment & submission of report; update database as needed; deposit checks and file reports alphabetically.
5. Contact any organizations who do not meet the deadline for reports
6. Deliver reports to accountant by April 20
7. Meet with accountant by May 1 to discuss omissions; follow up with phone or email messages
8. Meet with Asst. Treasurer and accountant to finalize IRS returns prior to May 15.

General membership

1. Produce mailing labels and copies of membership appeal in November.
2. Record dues payments and correct database as needed; deposit.
3. Maintain list serve membership

General Tasks in Graph Form and when they happen...

	Board Meeting	Individual Members	Affiliate Members	Institute	Annual Meeting	One Book
November	x	x	x			
December			x			x
January	x		x			x
February			x			x
March	x	x	x			
April						
May						
June	x					
July						
August	x		x	x		
September			x	x	x	
October					x	