



**SDFM** | Chapter

**Buckeye**

SDFM Buckeye Chapter Bylaws

April 30, 2025

# BYLAWS OF THE SOCIETY OF DEFENSE FINANCIAL MANAGEMENT (SDFM) - BUCKEYE CHAPTER

(Approved April 2025)

## ARTICLE I – Logo & Design Elements

**Section 1.1** COLORS & LOGO. The logo for the Buckeye Chapter will have “SDFM | Chapter” in the national dark blue color, and the symbol and “Buckeye” in scarlet.

**Section 1.1.1** The SDFM National insignia is in gold, and dark blue lettering, as per the expressed style guidelines.

**Section 1.2** LOGO USE. The Chapter’s logo is authorized for use on (or with) all forms of Chapter correspondence or communication to include, but not limited to, letterhead stationery, award or recognition certificates, newsletters, web site home and community pages, publicity or recruiting materials, and fundraising or give-away merchandise. The Chapter’s Executive Committee may approve other uses consistent with both SDFM’s and this Chapter’s constitution and bylaws.

**Section 1.3** DESIGN ELEMENTS. Five stars will be included on the Buckeye Chapter design images and icons, but not included on the logo. These stars signify the Chapter’s commitment to earn and receive SDFM's Five- Star designation while active as an SDFM Chapter. Other design elements identified as associated with the Buckeye chapter will be used for general publications.

## ARTICLE II –Business Year & Term of Office

**Section 2.1** The Chapter’s business year will be from 1 July of the current calendar year to 30 June of the following calendar year.

**Section 2.1.1** Chairpersons of Chapter Committees serve the same term of office specified in section 3.1. They may be reappointed by the Executive Committee for one or more terms to the same chairperson role. See Article XI.

**Section 2.1.2** The Incumbent Treasurer will remain in their position until the Chapter’s books of account are audited/closed and applicable tax returns are filed (approximately 3-4 months after the end of the business year.

**Section 2.2** Executive Committee Terms of Office shall be for 2 years, with the exception of the President-Elect, which shall remain one year. The starting dates will correspond with the start

of a business year on 1 July and end two years later on 30 June.

**Section 2.2.1** In the event of an officer leaving their position within the term of office, an election may be held to fill the position for the remainder of the term.

**Section 2.3** The short period between receiving the oath of office and beginning to serve the term of office will be considered a transition period. During this period, the outgoing officers (and chairpersons) are expected to orient the incoming officers (and chairpersons) to their duties as well as continue to fully discharge their currently- assigned duties.

## **ARTICLE III – Membership Meetings, Motions, Voting & Quorums**

**Section 3.1** Active and Life members have the right to speak at the Chapter’s general membership meetings, to make motions while in attendance, and to vote at that time (or at a time and method designated by the Chapter’s Executive Committee) on motions originated there at.

**Section 3.2** Honorary, Student, Retired, and Corporate members have the right to speak at meetings, but not to make motions or to vote on any motions.

**Section 3.3** Ten percent (10%) (e.g., 350 x 10% = 35) of the Active and Life members on the Chapter’s current membership listing/roster shall constitute a quorum for the transaction of business in any general membership meeting of the Chapter.

**Section 3.3.1** This section does not apply to meetings of the Chapter’s Executive Committee. See Article XII.

**Section 3.4** The Chapter’s general membership must vote on: (1) all Chapter- initiated membership dues proposals; (2) on all expenditures of Chapter funds not otherwise authorized in the Chapter’s annual budget or elsewhere established under the articles within these bylaws; (3) revisions to the Chapter’s constitution or bylaws; (4) additions to or removals from permanent Chapter officer positions; and (5) other issues the Chapter’s Executive Committee deems appropriate.

## **ARTICLE IV – Dues & Fees**

**Section 4.1** All members will pay membership dues as established by SDFM’s National Council and the Chapter. The Chapter may establish and collect annual dues by vote of the membership. Dues are assessed on the member’s anniversary date and are payable in advance. The payment of dues is the principal determining factor as to whether a member is “in good standing” as a member.

**Section 4.2** The Chapter’s Executive Committee may establish event fees and/or fundraising

donation amounts (to zero-out operating expenses or provide for endowment of scholarships and continuing education grants) without vote of the general membership. See Article XIV.

**Section 4.3** All retained funds of the Chapter will be deposited into commercial bank, credit union, or federally insured savings and loan association accounts established in the name of the Chapter.

**Section 4.4** All actions under this article must comply with Article IV, Section 5, of the Chapter's constitution.

## **ARTICLE V – Chapter Records & Audits**

**Section 5.1** The following Chapter records must be kept on a permanent basis;

**Section 5.1.1** SDFM's constitution and bylaws.

**Section 5.1.2** SDFM's policy declarations.

**Section 5.1.3** Chapter's constitution and bylaws.

**Section 5.1.4** Chapter's tax-exempt designation number (which resides with the Chapter Treasurer.)

**Section 5.2** The Chapter's books of account (i.e., financial records), checkbooks, minutes of meetings, membership rosters, newsletters and competition packages will be retained as a historical record of the Chapter for an indefinite period or until the Chapter's Executive Committee votes to dispose of them.

**Section 5.2.1** Financial records must be maintained for a minimum of seven (7) years from closeout of the year of origination.

**Section 5.2.2** Chapter records over seven (7) years old may be destroyed.

**Section 5.3** An auditor or audit committee appointed by the Chapter's Executive Committee (less the Treasurer) will audit the financial records at the end of each fiscal year or within 90 days of the election of new Chapter officers.

**Section 5.4** Upon Chapter inactivation or dissolution, the records will be sent to the SDFM National Executive Committee for disposition as required by SDFM's bylaws.

## **ARTICLE VI – Member Records**

**Section 6.1** To allow the Chapter to effectively communicate with Chapter member, Chapter members are required to provide and keep current the following to the Chapter's Membership Committee;

**Section 6.1.1** Home address (sent to SDFM Headquarters as well)

**Section 6.1.2** Email address (if the member has one). Members without a current email address on file may not receive notices of Chapter activities, programs, elections, or votes.

## **ARTICLE VII – Membership Applications & Transfers**

**Section 7.1** For persons seeking membership or reinstatement as a member, a SDFM membership application, together with necessary dues and/or fees, can be completed online, or through a paper application which will be forwarded through the Chapter's Membership Committee to SDFM Headquarters. SDFM's Executive Director will issue an appropriate certificate of membership.

**Section 7.2** Applications for Student, Life and Honorary membership will be in accordance with SDFM's constitution.

**Section 7.3** The Chapter will accept transfer of, and extend guest privileges to, all members in good standing from any other Chapter or from SDFM Headquarters. Transfers will be accepted in the status held by the member on the date of application.

**Section 7.3.1** There will be no transfer charges, and no transfer of funds, between Chapters.

## **ARTICLE VIII – Election of Officers**

**Section 8.1** Only those Active and Life members living within the Columbus local commuting area of the Chapter, in good standing (i.e., annual dues are paid), and who have signified their intent to serve as a Chapter Officer, if elected, shall be nominated for, or elected to such office. Officers (excepting the President and President-elect) may choose to be considered for a one-time reelection to (i.e., serve consecutive terms in) the same office. This means the Chapter Vice-Presidents, Secretary and Treasurer may not serve more than two consecutive terms in the same office.

**Section 8.2** A Nominating Committee appointed by the Chapter President will develop a slate of up to three willing nominees to run for each of the Chapter's offices. The committee will consider nominees for each office to be obtained from nomination requests or forms distributed either hardcopy or electronic (preferred method) to all Active and Life members of the Chapter.

This slate of proposed candidates shall be presented to the Chapter's Executive Committee prior to the date of election.

**Section 8.2.1** The Executive Committee may (1) accept the slate; (2) modify it, by deleting and adding names; or (3) reject the slate and replace it with a slate of its own. Names proposed as replacements must have agreed to the criteria of Section 1. The final slate shall have no more than three names proposed for each office.

**Section 8.3** The annual election of officers will be conducted during the April-May time frame. The newly elected officers will take the oath of office at the June meeting of the general membership and enter office on July 1.

## **ARTICLE IX – Voting**

**Section 9.1** Chapter officers will be elected by a simple majority vote of a quorum of the Chapter membership in attendance at a regularly scheduled meeting or a simple majority vote of those active Chapter members casting their votes either hardcopy or electronic (preferred method) during the annual (or a special ballot) election called on by the Chapter's Executive Committee. No proxy votes are permitted.

**Section 9.2** Two to three Past Chapter Presidents - an Elections committee - shall receive and tally the results of the voting. They will provide the result to the Chapter's current Executive Committee to allow for official notification by the Chapter President or Nominations & Elections Chairperson to the candidates, prior to official release to the membership.

**Section 9.3** Ties: In the event of a tie in the tally for candidates for the same office, a run-off election will be held using the provisions of Sections 1 & 2. If a second tie occurs, the candidate's names will be placed before the current Executive Committee for discussion and a secret ballot taken to break the tie. No Executive Committee member running for office with a tie vote may be present for the discussion or vote on that office.

**Section 9.4** A vacancy occurring in any office shall be filled for the unexpired term by a person elected by a majority vote of the remaining members of the Executive Committee. A past Chapter President will administer the oath of office. (Exception: Chapter President's office. See Article XI President-Elect.)

**Section 9.5** Any Chapter officer may be removed from office for proper cause by a two-thirds vote of the members of the Chapter's Executive Committee. This vote must be confirmed by a three-fourths vote of a quorum of the general membership of the Chapter attending a regular or special meeting. No proxy votes are permitted.

## ARTICLE X – Officer Duties

**Section 10.1** Chapter President. This person is the presiding officer, who will enforce all articles of the Chapter's constitution and bylaws, contracts, etc.; execute such papers as will require signature; exercise general supervisory control over the affairs of the Chapter; maintain contact with SDFM's Executive Director; determine the division of responsibilities for committees and appoint their chairpersons; serve as ex-officio member of all committees or other governing bodies and examine their minutes, books and records.

**Section 10.1.1** The Chapter President will establish an Executive Committee. This committee is composed of the Chapter officers. It conducts and is responsible for Chapter business matters, including but not limited to oversight of Committees. It also develops and supervises the overall Chapter program.

**Section 10.1.1.a** In conducting its duties, a quorum of the officers is required for motions to be proposed, seconded, and voted upon. Electronic (email) voting may be used.

**Section 10.2** President-Elect. This person will oversee the committees assigned by the Chapter President and sign such Chapter documents as may be required.

**Section 10.2.1** In the temporary absence of or vacancy in the office of – the Chapter President, this person will perform the duties of the President.

**Section 10.2.2** The President-Elect will automatically ascend to the Chapter Presidency in the Chapter's succeeding business year, unless unable or unwilling to do so.

**Section 10.3** Vice-Presidents. These persons will oversee the committees assigned to them by the Chapter President and sign such Chapter documents as may be required.

**Section 10.4** Secretary. This person will oversee the committees assigned by the Chapter President and sign such Chapter documents as may be required.

**Section 10.4.1** This person will record the proceedings of the Chapter's general Membership, Executive Committee and Planning Board meetings; be custodian of the charter, logo, documents, and papers of the Chapter; maintain contact with SDFM Headquarters; answer correspondence; provide assistance; and perform other duties as may be directed by the Chapter President.

**Section 10.5** Treasurer. This person will oversee the committees assigned by the Chapter President and sign such Chapter documents as may be required. Incumbent remains in this office until the Chapter's books of account are audited/closed and applicable tax returns are filed (approximately 3-4 months after the end of the business year), in accordance with section 3.1.

**Section 10.5.1** This person will receive and deposit all monies of the Chapter; pay its just bills; maintain its tax-exempt number; maintain its books of account; and make

appropriate reports on the financial condition of the Chapter to the Chapter President and the Chapter membership as directed.

**Section 10.6** The Chapter officers will serve without compensation.

**Section 10.7** A listing of current Chapter officers, their phone numbers and addresses, and the Chapter's official business address shall be provided to SDFM's National Executive Director as required by SDFM's bylaws.

## **ARTICLE XI – Committees**

**Section 11.1** The committees that will be in effect during the Chapter's business year and oversight of these committees by members of the Chapter's Executive Committee will be determined annually by the new Chapter President.

**Section 11.2** The chairperson of each committee will be appointed by the Chapter President to serve a one-year term of office (which may be renewed one or more times at the discretion of the Executive Committee). Rotation of committee chairpersons (after two terms of office in the same chairperson role) is strongly encouraged.

**Section 11.3** Each Chapter committee should consider being made up of at least three members, so backup is available. (Exception: The Executive Committee is comprised of all Chapter officers.)

**Section 11.4** A complete listing of current Committees is kept by the Chapter's Officers and will be published to the chapter's website.

**Section 11.5** Ad Hoc Committees. These short-term committees may be established for specific tasks as approved by the Chapter President. Each ad hoc committee will have a definite charter or specified guidance, along with a beginning and ending date. These include, but are not limited to:

**11.5.1** Audit. This committee is responsible for having within 90 days of closeout of the Chapter's business year, the annual audit of the Chapter's financial records and accounts done by an outside source. Additionally, to have an audit conducted within 90 days of a change in the Chapter President or Treasurer. The completed audit is sent to SDFM's National Treasurer as required by SDFM's bylaws.

**11.5.2** Constitution & Bylaws. This committee is responsible for maintaining the currency of the Chapter's constitution and bylaws. Changes can only be made when approved by the Chapter's Executive Committee and the general membership. See Article XVI.

**11.5.3** Nominations & Elections. This committee is responsible for administering the Chapter's annual election of new officers. See Article IX.



**11.5.4 PDI.** This committee is responsible for determining the criteria for member attendance at SDFM's annual Professional Development Institute (PDI) and for assisting with the attendance process, if needed.

## **ARTICLE XII – Committee Records**

**Section 12.1** Each Committee must maintain the following, and submit copies to the Chapter's history committee:

**Section 12.1.1** Annual budget submission (if a budget is needed)

**Section 12.1.2** Checklists or procedural guidance (SOPs) for carrying out its responsibilities.

**Section 12.1.3** Correspondence and documentation e.g., email, letters, contracts/invoices (if applicable), brochures/pamphlet /posters, minutes, reports supporting its annual program.

**Section 12.2** During the Chapter's business year, each Committee chairperson is responsible for providing copies of the above correspondence and documentation to the designated committee in charge of National Awards, in compliance with the submission calendar/schedule posted at the Chapter's web site and through email reminders but no later than the last day of February.

**Section 12.3** Committee chairpersons will present a brief report at Chapter Planning Board or Chapter Executive Committee meetings when requested by the Chapter President.

## **ARTICLE XIII – Expenditures**

**Section 13.1** No individual Chapter member has the authority to commit or obligate Chapter funds, except as provided in the following sections.

**Section 13.2** Chapter expenditures are based on an estimated annual budget solicited from the Chapter's committee chairpersons by the Chapter's Treasurer.

**Section 13.3** Two signatures are required on all checks expending Chapter funds. They can be a combination of that of the Chapter President, President-Elect, Vice-Presidents, Secretary and/or Treasurer.

**Section 13.3.1** To expend Chapter funds, all officers, upon taking office, must sign the servicing financial institution's authorization/signature cards and withdraw them upon

leaving office.

**Section 13.4** Expenditures can be made with the Chapter's debit Card, after being approved as part of the estimated annual budget approval process, and after approval by the Executive Board to use the Debit Card in place of a check.

**Section 13.5** Annual expenditures have historically been approved by precedent by the Chapter's prior Executive Committees. See Article V. The Executive Committee may approve lesser or higher numbers (to include none) or amounts based on the annual financial status of the Chapter. Upon entry into the Chapter's annual budget, the numbers and amounts of these expenditures become pre-approved.

**Section 13.6** Chapter members may be reimbursed by check for incidental expenses incurred to carry out the duties of the Chapter committees to which they belong. Major expenses may be reimbursed (if):

**Section 13.6.1** The proceeds of committee activities are expected to equal or exceed the level of their expenses (note: a separate account may be set up to support the activity). (Examples of the committee activities include the Annual Rose Sale; Spring Professional Development Opportunity (PDO).) or

**Section 13.6.2** By approval of the Chapter's Executive Committee (if under \$500) or by approval of the Chapter membership (if \$500 or over).

**Section 13.7** Past President's Legacy (Celebration) Fund (established 2014): an account separately monitored by the Chapter Treasurer and Chapter President. \$250 (up to \$500) per business year. Expenditure can be made for: the celebration of Chapter accomplishments, milestones, and/or members who have provided exemplary, sustained service (IAW suggested criteria) to the Chapter during the business year.

**Section 13.8** The Chapter is fully responsible for its own financial (and legal) affairs and may not seek compensation or protection from the Society's National Office or Officers. Thus, the Chapter and its Executive Committee shall not authorize individual or combined expenditures that would exceed the Chapter's funds.

**Section 13.9** SDFM's National Office has purchased liability insurance for its Chapters to preclude members being held personally liable for a Chapter's debts. See Chapter Management at SDFM's web site.

## **ARTICLE XIV – Publications**

**Section 14.1** The Executive Committee will establish a Communications Committee. This committee is responsible for publishing, at a minimum, a quarterly newsletter in either hardcopy or electronic (Internet) format.

**Section 14.2** The Chapter’s newsletter shall be known as “The Update.”

**Section 14.3** The Chapter’s Microsite is on the SDFM Engage Platform.

## **ARTICLE XV – General**

**Section 15.1** No local DoD activity or installation will be obligated, financially or otherwise, by any action of the Chapter. Additionally, the Chapter will not represent itself as an instrument of the DoD, its local activities, or installations.

**Section 15.2** No facilities, equipment or utilities at the local DoD activities or installations will be used by the organization without the approval of the senior Director, Commander, Administrator or Comptroller.

**Section 15.3** The Chapter’s programs and activities will not prejudice or discredit the local DoD activities or installations, the military services, or other agencies of the U.S. Government.

## **ARTICLE XVI – Amendments, Reviews, and Distribution**

**Section 16.1** These bylaws may be amended. A copy of any approved amendments will be submitted to SDFM’s National Secretary as required by SDFM’s bylaws.

**Section 16.1.1** Notice of the proposed amendment shall have been given at a general membership meeting and by one or more of the following: the Chapter newsletter; a broadcast email; web site posting. The proposed amendment shall be subject to final approval by the Chapter’s Executive Committee.

**Section 16.2** The Chapter’s Executive Committee may approve and publish procedural documents to clarify or detail the steps necessary to carry out the various Chapter activities and programs.

**Section 16.3** The Executive Committee will review the bylaws at least every five years.

**Section 16.4** A copy of these bylaws is available to any Chapter member at our website.

## **ARTICLE XVII – Amendments, Reviews, and Distribution**

**Section 17.1** These bylaws become effective upon approval by the membership.