



Chapter Leader Descriptions

Sigma has developed chapter leader “job” descriptions that can be used as templates to better define the roles and responsibilities of the leaders serving your chapter.

Chapter Leader Qualifications

- Active member in the chapter
- Completed the consent to serve in the position
- Positions required in the chapter bylaws have a two-year commitment

Chapter Leader Resources

- The All Chapter Officers Workgroup in The Circle is the learning hub for all of Sigma’s chapter leaders. Visit <https://thecircle.sigmanursing.org/mygroups> to access the workgroup. Take part in discussions, ask questions, view a full list of important upcoming dates, and access a library with more than 400 training resources, including orientation information for your specific position.
- Visit your Regional Officer Connect Workgroup in The Circle to connect with other chapter leaders in your region and your regional coordinator!
- Access the Chapter Management System (CMS) to download membership rosters, review nurse leader applications, submit important reports to headquarters, write news for *Sigma Update* and more. Visit <https://management.sigmanursing.org> to get started.
- Each chapter has a website hosted in The Circle. These free resources are an excellent way for chapters to connect with members, create a sense of community, and establish an online presence. Access your chapter website by use the direct URL: CHAPTERGREEKNAME.sigmanursing.org. (ex. deltaupsilon.sigmanursing.org).

President (Required)

- Act as the executive officer and administrator of all business of the chapter as stated in the bylaws:
 - Participation in the biennial convention House of Delegates and other business brought forth before the House of Delegates during the term.
 - All reports are submitted to headquarters in a timely manner. Reports include: chapter annual report, bylaws submission form, verification of fees report (when applicable) and the chapter officer/committee chair report.
- Serve as chief representative of the chapter:
 - In inter-chapter activities at the regional level.
 - Strengthen and maintain relationships with the head of chapter institutions of higher education and practice settings through regular communications and meetings.
 - Advocate for the chapter with major service agencies in the community to publicize the importance of and demonstrate value of membership and gain additional community advocates.
- Lead the chapter board of directors and leadership:
 - Delegate responsibilities not otherwise handled by the chapter bylaws to the chapter officers, committees, task forces, and advisory councils.

- Finalize the appointments, recommended by the Board of Directors, for all committees, advisory councils or task forces.
- Prepare a calendar and agenda for all Board of Directors and annual business meetings with assistance, as needed, from the secretary.
- Plan, arrange, and facilitate an orientation meeting for all newly installed chapter leaders. The purpose is to facilitate the transfer of duties and responsibilities and to formulate the strategic plan of the chapter for the coming year.
- Serves as an ex-officio member of all committees except the Leadership Succession Committee,
- Develop and maintain policies and procedures related to the position of president. Submit modifications or new policies and procedures to the Board of Directors for approval.
- Ensure members receive benefits and chapter transparency:
 - Ensure at least one business meeting and at least two programs or events that support the purposes and goals of the honor society are held during each fiscal year.
 - Communicate the business, projects and activities of the Board of Directors to the membership.
- Skills Gained through service:
 - Leading a non-profit/non-governmental organization
 - Team Dynamics
 - Strategic Planning
 - Delegation
 - Budgeting

President-Elect (optional position)

- Be mentored by current chapter president:
 - Prepare to succeed into the presidency at the end of a one- or two-year term of office.
 - Learn the chapter operations and facilitate the achievement of chapter goals and mission of Sigma.
 - Serve on the chapter's board of directors.
 - Develop and maintain policies and procedures related to the position of president-elect. Submit modifications or new policies and procedures to the Board of Directors for approval.
- Fulfill other duties as assigned by chapter:
 - Serve as chair of committees
- Serve as an advocate for the chapter to the public and nursing organizations.
- Skills gained through service:
 - Serve on a non-profit/non-governmental organization board of directors
 - Team communication
 - Leadership of committee

Vice President (Required)

- Serve on the chapter's board of directors:
 - Perform the duties of the president in the president's absence. *In an at-large chapter, a designated vice president should be chosen to perform these duties.*
 - Succeed into the office of president and serve until the next election in the event that the president vacates his/her officer during the two-year term. *In an at-large chapter, a designated vice president should be chosen to perform these duties.*
 - Prepare an annual report to the chapter membership regarding the vice-president's responsibilities and activities.
 - Develop and maintain policies and procedures related to the position of vice president. Submit modifications or new policies and procedures to the Board of Directors for approval.
- Lead membership benefit efforts:

- Oversee the planning of chapter programs ensuring that at least two programs or events that support the honor society's purposes and goals are held each year.
- Fulfill other duties as assigned by chapter:
 - Be chair of committees, as needed.
- Skills Gained through Service:
 - Serve on a non-profit/non-governmental organization board of directors
 - Understanding industry needs
 - Membership satisfaction
 - Program planning (in-person or virtual)
 - Team communication
 - Leadership of committee
 - Budgeting

Secretary (Required)

- Serve on the chapter's board of directors:
 - Record, write, and distribute the minutes for each Board of Directors and business meeting.
 - Keep an official record book of the minutes, in perpetuity, of all Board of Directors and business meetings to present to the succeeding secretary.
 - Prepare an annual report to the chapter membership regarding the secretary's responsibilities and activities.
 - Develop and maintain policies and procedures related to the position of secretary. Submit modifications or new policies and procedures to the Board of Directors for approval.
- Lead communication to the chapter membership:
 - Organize, write, and distribute all membership communication about chapter activities.
 - Develop and maintain chapter's online outlets for publicity or membership communication.
 - Serve as chair of chapter communications committee, if applicable.
- Fulfill other duties as assigned by chapter:
 - Serve on committees as needed.
- Skills Gained through Service:
 - Serve on a non-profit/non-governmental organization board of directors
 - Team communication
 - Leadership of committee
 - Social Media
 - Communication standards
 - Budgeting

Treasurer (Required)

- Serve on the chapter's board of directors:
 - Prepare and present a current financial report to the board of directors at each meeting.
 - Prepare and submit an annual budget to the board of directors with appropriate committee advisory council or task force.
 - Develop and maintain fiscal policies and procedures in collaboration with the appropriate committee. Submit new policies or modifications of existing policies to the board of directors for approval.
 - Prepare an annual report to the chapter membership regarding the treasurer's responsibilities and activities.
- Be custodian of the chapter funds:
 - Prepare and submit the financial section of the chapter annual report.
 - Work with an accountant on a biennial audit.
 - Obtain and complete necessary tax forms for the Internal Revenue Service (US chapters only).

- If the chapter is not using the online induction system, write checks needed for international induction fees and jewelry and honor cord orders.
- Manage the investment plan of the chapter with support from the board of directors.
- Be aware of Sigma's policies and timelines regarding chapter checks, and communicate how your chapter would like them delivered.
- May be bonded in an amount equal to three-fourths of the worth of the chapter.
- Skills Gained through Service:
 - Serve on a non-profit/non-governmental organization board of directors
 - Team communication
 - Leadership of committee
 - Financial accountability and accounting standards
 - Budgeting

Counselor (Required)

- Serve on the chapter board of directors:
 - Prepare an annual report to the chapter membership regarding the counselor's responsibilities and activities.
 - Develop and maintain policies and procedures related to the position of counselor. Submit modifications or new policies and procedures to the board of directors for approval.
- Lead the recruitment process and be an advocate for membership in the organization:
 - Lead the procedure for determining membership eligibility and inducting members.
 - Develop strategies for publicizing and informing students and nursing leaders of membership eligibility criteria.
 - Secure necessary data from the official records of students to determine eligibility status.
 - Notify students of their eligibility status and send out the appropriate membership application materials.
 - Prepare and set up inductions using the Online Induction System. Should download the latest version and consult the Online Induction System manual for each induction.
 - Prepare for inductions by downloading and customizing the induction scripts and slides.
 - Work with the appropriate parties to plan induction ceremony events.
 - Download and send the "Sample Letter to Send Before Induction" to each eligible candidate before induction.
- Serve on committees:
 - Serve on the Governance Committee (may be appointed as chair).
 - Work with other committees, as assigned.
- Skills Gained through Service:
 - Serve on a non-profit/non-governmental organization board of directors
 - Team communication
 - Leadership of committee
 - Recruitment best practices
 - Budgeting
- Special Notes about Counselors:
 - Counselors of alumni chapters who oversee nurse leader inductions are not required to be faculty.
 - At-large chapters should have a counselor at each institution of higher education and practice setting.

Governance Committee (Required)

- Committee Structure:
 - 4 committee members
 - 3 elected **or** appointed
 - 1 member is the Counselor
 - Chair appointed by chapter president
- Reports to the board of directors:
 - Prepare an annual report to the chapter membership regarding the governance committee responsibilities and activities.
 - Develop and maintain policies and procedures related to the governance committee. Submit modifications or new policies and procedures to the board of directors for approval.
- Membership eligibility:
 - Oversee chapter membership eligibility issues and determine where the exception clauses apply.
 - Collaborate with Counselor to promote membership to potential candidates.
 - Assist with the planning and organization of the induction.
- Chapter bylaws:
 - Lead the bylaws amendment process by considering, reviewing, editing and/or correlating amendments as suggested or appropriate
 - Utilize the updated chapter bylaws template created by Sigma each biennium.
 - Submit the updated bylaws to Sigma every even year and when the chapter makes bylaws alterations.
- Skills Gained through Service:
 - Serving on a committee
 - Team communication
 - Organizational governance
 - Recruitment best practices

Leadership Succession Committee (Required)

- Committee Structure:
 - 3 **elected** members
 - Chair appointed by chapter president
- Reports to the board of directors:
 - Prepare an annual report to the chapter membership regarding the leadership succession committee responsibilities and activities.
 - Develop and maintain policies and procedures related to the leadership succession committee. Submit modifications or new policies and procedures to the board of directors for approval.
- Member Development:
 - Develop members in organizational leadership roles across the span of their careers.
 - Mentor members to assume positions at all levels of the organization.
- Elections:
 - Oversee the selection of members who can provide the necessary leadership to achieve chapter goals and to meet the needs of members.
 - Manage the preparation, distribution and tallying of election ballots.
 - Notify all candidates (elected and non-elected) of the election results.
- Submit the list of new officers to headquarters within two weeks of officer elections and provide headquarters with updates as they occur.
- Skills Gained through Service:
 - Serving on a committee
 - Team communication
 - Organizational governance

- Leadership Development
- Special Note about Leadership Succession Committee: Those serving on the Leadership Succession Committee are not permitted to be on the slate of candidates for officer or committee positions.

Director (optional position)

- Serve on the chapter's board of directors:
 - Prepare an annual report to the chapter membership regarding the director's responsibilities and activities.
 - Develop and maintain policies and procedures related to the position of director. Submit modifications or new policies and procedures to the board of directors for approval.
- Fulfill other duties as assigned by chapter:
 - Serve on committees, task forces, or advisory councils, as needed.
 - Support chapter initiatives as determined by the board.
- Skills Gained through Service:
 - Serve on a non-profit/non-governmental organization board of directors
 - Team communication
 - Leadership of committee
 - Budgeting

Publicity/Newsletter Committee (optional committee)

- Reports to the board of directors:
 - Prepare an annual report to the chapter membership regarding the publicity/newsletter committee responsibilities and activities.
 - Develop and maintain policies and procedures related to the publicity/newsletter committee. Submit modifications or new policies and procedures to the board of directors for approval.
- Publicize the chapter:
 - Oversee the development and implementation of promotional strategies to maintain chapter visibility within the community.
 - Collaborate with secretary to promote program, conference and chapter activity announcements in public venues.
 - Manage the development of content for chapter displays at special events.
 - Collaborate with secretary to maintain and update chapter website, social media, and online presence.
- Create and publish chapter newsletter:
 - Manage the development process and publishing of the chapter newsletter.
 - Submit content online for the monthly *Sigma Update* e-newsletter that is distributed by headquarters.

Research Committee (optional committee)

- Reports to the board of directors:
 - Prepare an annual report to the chapter membership regarding the Research committee responsibilities and activities.
 - Develop and maintain policies and procedures related to the research committee. Submit modifications or new policies and procedures to the board of directors for approval.
- Oversee the process of developing, reviewing and revising criteria for research awards and the funding of research grants.
- Manage the process for reviewing and evaluating abstracts for research awards and proposals for research grants.

- Oversee the planning of any chapter research conferences or research day activities.
- Manage the development of strategies for promoting the conduct of research and for the dissemination and utilization of research findings.
- Recruit candidates for research awards - locally and internationally. Assist them with the application process.
- Note: Those serving as the Research Chair, on the Research Committee or as any other chapter leader are not eligible for research funding while in any appointed or elected positions.

Membership Involvement Committee (optional committee)

- Reports to the board of directors:
 - Prepare an annual report to the chapter membership regarding the Membership Involvement committee responsibilities and activities.
 - Develop and maintain policies and procedures related to the membership involvement committee. Submit modifications or new policies and procedures to the board of directors for approval.
- Oversee the promotion of membership renewal and membership involvement.
- Manage the process of involving members in chapter committee membership.
- Oversee the development and maintenance of a new member mentoring program.
- Plan and implement an orientation for new inductees and multiple and transfer members.
- Inform membership about Volunteer Profiles on The Circle, and encourage membership to submit profiles.
- Set up and monitor chapter volunteer opportunities on The Circle.

Awards Committee (optional committee)

- Reports to the board of directors:
 - Prepare an annual report to the chapter membership regarding the awards committee responsibilities and activities.
 - Develop and maintain policies and procedures related to the awards committee. Submit modifications or new policies and procedures to the board of directors for approval.
- Oversee the process of developing, reviewing, revising criteria and funding for recognition awards and scholarships.
- Manage the process for reviewing and judging award and scholarship applications.
- Recruit candidates for awards and scholarships - locally, regionally and internationally. Assist with the application process.
- Ensure that all applicants are notified of judging results, selected or not selected. Inform award and scholarship recipients of the manner in which they will receive their award or scholarship.
- Coordinate preparation of entries for any regional or international awards in which the chapter wishes to make application.
- Encourage chapter members and leaders to apply for international awards.
- Note: Those serving as the Awards Chair, on the Awards Committee, or as any other chapter leader are not eligible for scholarships or other monetary awards while in any appointed or elected positions.

Philanthropy Committee (optional committee)

- Reports to the board of directors:
 - Prepare an annual report to the chapter membership regarding the philanthropy committee responsibilities and activities.
 - Develop and maintain policies and procedures related to the philanthropy committee. Submit modifications or new policies and procedures to the board of directors for approval.

- Ensure that the chapter is following all appropriate legal requirements in order to fundraise.
- Collaborate with the appropriate committee to evaluate chapter income sources, and determine financial needs above and beyond collection of member fees.
- Oversee the development of strategies for funding specific chapter projects as determined by the board of directors.
- Manage the implementation of projects and events that increase funds as well as the visibility of the chapter.
- Manage the philanthropy events and ensure that an effective publicity program is in place, through collaboration with the appropriate committee.
- Coordinate the donation of goods or services, if necessary, for the event.
- Solicit the general membership for participation in hosting the event.
- Participate in the philanthropy programs, activities and events along with members of the appropriate committee.
- After completion of the event, oversee the evaluation of the event in terms of number of participants, amount of money raised, etc.

Finance Committee (optional committee)

- Reports to the board of directors:
 - Prepare an annual report to the chapter membership regarding the finance committee responsibilities and activities.
 - Develop and maintain policies and procedures related to the finance committee. Submit modifications or new policies and procedures to the board of directors for approval.
- Oversees the monitoring of the chapter's financial procedures and status.
- Manages the preparation of an annual budget and submits the proposed budget to the chapter board of directors.
- Oversees the monitoring of the chapter's budget performance on a regular basis, and analyzes variances in expense and revenue from expected performance.
- Reviews chapter investment policy on an annual basis and recommends desired changes in policy and procedure.
- Ensures committee participation in the selection of an auditor, reviews the audit report and recommends any corrective action required.
- At the discretion of the board of directors, may oversee the committee's function as an internal audit committee.
- When needed, ensures direct assistance to the chapter treasurer in financial management functions.

Archivist (optional position)

- Reports to the board of directors:
 - Prepare an annual report to the chapter membership regarding the archivist responsibilities and activities.
 - Develop and maintain policies and procedures related to the role of archivist. Submit modifications or new policies and procedures to the board of directors for approval.
- Oversee the filing and/or preservation of committee meeting minutes.
- Manage the collection and preservation of statistics, documents, individual contributions and other information of historical significance for the chapter.
- Oversee the process of developing and maintaining a written history of the chapter, which is annually reviewed and updated.

Membership Ambassador (optional position)

- Reports to the board of directors:
 - Prepare an annual report to the chapter membership regarding the membership ambassador responsibilities and activities.
 - Develop and maintain policies and procedures related to the role of membership ambassador. Submit modifications or new policies and procedures to the board of directors for approval.
- Liaison between members and the chapter.
- Strengthen the connection with new inductees and first-year members.
- Create welcoming environments and orient new members.
- Participate in periodic conference calls with Sigma headquarters.
- Encourage interest in the chapter's pre-induction activities.
- Introduce new members to The Circle and encourage networking.
- Assist chapter to organize one annual program dedicated to interests of recent inductees and new graduates.
- Participate in leadership succession by shadowing chapter leaders, participating in board meetings or conference calls and collaborating with member involvement committee.
- Survey or foster discussions to understand the needs of new members or candidates.
- Regions may elect to utilize a regional committee to link ambassadors across the region and foster collaboration.

Retired Member Ambassador (optional position)

- Serves on the chapter Board of Directors
- Serves as liaison between retired and soon-to-be-retired members of the chapter and the region and/or international organizations
- Surveys/explores interests of retired members to facilitate decisions related to continued involvement in retirement
- Engage retired members through Sigma's volunteer portal on The Circle, working with identified chapter officer to access volunteer profiles and involve retired members in chapter activities and committees, and leadership succession
- Compiles recommendations for how Sigma and its chapters can better engage members who are retired or approaching retirement, including the identification of activities that will help the member populations stay actively involved
- Leads efforts to engage retired members and nursing leaders in the community and the chapter
- Mentors new leaders and new members as requested
- Works in partnership with the Chapter Counselor to identify nurse leaders eligible for membership
- Assists chapter to organize or plan one program per year dedicated to the interests of recently retired and retired members
- Assists chapter members, who are in the process of relocating, find a local Sigma chapter in their new location
- Serves on committees as assigned
- Special Notes about Retired Member Ambassadors:
 - Someone serving as a Retired Member Ambassador should be an active-dues paying retired or soon-to-be-retired member.

Webmaster (optional position)

- Reports to the board of directors:
 - Prepare an annual report to the chapter membership regarding the webmaster responsibilities and activities.

- Develop and maintain policies and procedures related to the role of webmaster. Submit modifications or new policies and procedures to the board of directors for approval.
- Responsible for monitoring, improving and updating chapter website.
- Oversee the overall maintenance of chapter website.
- Coordinate with chapter leaders to obtain relevant content and post it to the chapter site.
- Publicize events, deadlines and important news to members.
- Employ Sigma best practices to ensure website is valuable to members.
- Create a maintenance schedule to ensure website is always timely and up to date.
- Work with chapter Publicity Committee and Secretary to write website content into chapter's overall communications plan.
- Ensure chapter leaders interact with the discussion forum regularly.