

Local Court Officers and Duties

This section addresses the duties of the Local Court Officers as well as information regarding meetings. Information regarding eligibility, term of office, and succession may be found in the Bylaws.

- I. **The Regent shall** (See Attachments 1, 2, 3, 4 - Tips for Regents, Sample Agenda without Script, Script for Local Court Meeting, and Suggested Set Up for Court Room)
 - A. Preside at all meetings
 - B. Prepare agenda for all meetings
 - C. Be responsible for transaction of all business of Local Court
 - D. Obtain permission by motion of the court before any expenditure that is not included in the approved budget or the approved standing rules.
 - E. Follow rules of debate
 - F. Enforce rules of Local Court (See Attachments 5, 6 - Standing Rules and Standing Rules Outline)
 - G. Enforce Bylaws of THE ORDER
 - H. Interact with District Deputy/State Representative and State Officers
 - I. Oversee the participation in Circle of Love program
 - J. Ensure financial reviews are completed on time every six months (for the period ending March 31 due April 15 and ending September 30 due October 15)
 - K. Confer with the District Deputy/State Representative to select a date for the Financial Review. Ensure appropriate members are present at Financial Review (Regent, Vice Regent, Recording Secretary, Financial Secretary, Treasurer, and Financial Review Committee) along with appropriate material (See Attachments 7, 8, 9 - Financial Review Guidelines, Checklist for Financial Review, and Financial Review)
 - L. Ensure all books, files, etc. have been turned over to newly elected officers and appointed chairmen.
 - M. Appoint Circle of Love Chairmen, Standing Chairmen, Special Chairmen, and Committees (See Attachments 10, 11 - Checklist for Regents and Committees).

1. Standing Committees are those noted in the Circle of Love, Publicity/Public Relations and Financial Review (3 members)
 2. Special Committees are those committees set up to handle specific tasks such as Membership, Telephone, Sunshine, Bulletin, Budget, etc.
 3. Explain responsibilities to various Chairmen.
- N. Appoint a Ceremonial Coordinator who shall be responsible for the ceremonial activities of the Court.
 - O. Ensure Court officers have a list of all Court chairmen and committee members.
 - P. Ensure appropriate signatures are on file at bank. (current officers)
 - Q. Upon election, review checklist for Regents. (See Attachment 10 - Checklist for Regents)
 - R. Serve as an ex-officio member of all committees, EXCEPT NOMINATING COMMITTEE. (ex-officio member information is taken from Robert's Rules of Order Newly Revised)
 - S. Represent the Court at meetings of the State Court. Expenses may be paid by the Local Court.
 - T. Countersign all Local Court checks drawn and signed by the Treasurer.
 - U. Sign all correspondence of the Local Court unless authority is designated to the Recording Secretary.
 - V. After all attempts to retain a member have been exhausted, has final authority to terminate membership.
 - W. Immediately upon election, complete form 8822 and send to IRS (See Attachment 12 - Change of address for IRS)
 - X. Immediately upon election, ensure that the List of New Officers Form is sent to the National Office. (See Attachment 13 - New Officer List)
 - Y. Perform other such duties as the laws of THE ORDER require.

II. The Vice Regent shall

- A. Assist Regent when requested.

B. Perform other such duties as may be designated by the Regent such as

1. Membership Chairman
2. Standing Rules Committee Chairman

III. Recording Secretary shall

A. Keep accurate proceedings of all meetings (See Attachments 14, 15 – Content of Minutes, Sample of Minutes)

1. Have the following items at every meeting:

- a. Minutes Book
- b. Minutes of previous meeting
- c. Agenda for meeting
- d. Copy of National Bylaws
- e. List of all Committees
- f. Copy of Court's Standing Rules

B. Present lists of all bills to be paid to Court Treasurer.

C. Conduct correspondence of Local Court, except as specified under the duties of the Financial Secretary.

D. Perform other such duties as may be designated by the Regent.

IV. Financial Secretary shall

A. Receive and Transmit Monies. (See attachment 16 – Flow Chart of Funds)

1. Receive ALL MONIES for court
2. Issue receipts for all monies received regardless of whether it is cash or check.
3. Post receipts in cash book making proper notations for identification.
4. Post dues receipts on membership card.

5. Total receipts in cash book and transmit to Treasurer.
 6. Count money with the Treasurer.
 7. Receive receipt from Treasurer for monies received. Amount of money by fund should be noted on back of receipt (e.g. Dues - \$50, Fundraiser - \$100 etc.)
 8. File receipts from Treasurer.
 9. Post each member's account information from the cash book to the individual page in membership book. Note: It is recommended that member's ID number be entered on each member's page along with address and date she joined.
 10. Keep an account of all dues paid.
 11. Send a dues notice to those members whose dues are not current.
 12. Notify Regent regarding members who have dues in arrears. **Note: No officer has the right to terminate members from the rolls except the Regent.**
 13. Prepare a list of all members in arrears on dues on or before March 1 of the election year and give a copy of same to the Regent. (A delinquent member shall not be entitled to nomination for office or to vote at the election, unless all arrears are paid by the first meeting in March.)
- B. Report changes in membership. (See Attachments 17, 18, 19, 20, 21 – Application for Membership, Application for Renewal, Application for Transfer, Deletion Form, and Correction of Information Form)
1. Send forms according to instructions.
 - a. Additions
 - (1) Application Form
 - (2) Renewal Form
 - (3) Transfer Form
 - (a) Upon request from member for a transfer:
 - (i) Financial Secretary completes appropriate portion of form and signs form along with Regent

- (ii) Financial Secretary gives form to member requesting transfer
 - (iii) Financial Secretary sends deletion form to State and National
- (b) Member requesting transfer
 - (i) Completes appropriate section of form
 - (ii) Gives to Regent of new court
 - (c) Regent of new court must sign the Transfer and send it to the National Office to complete the transfer

Reminder: Transfer forms are valid for only ninety (90) days from issue. Once transfer has expired, previous membership has lapsed and status becomes that of a resigned member. Member can join again as a "Renewal."

b. Deletions

- (1) Complete a Deletion form when removing a member from your rolls.
 - (a) Death of member
 - (b) Resignation upon request by member
 - (c) Forfeiture due to non-payment of dues
- (2) Prior to deleting a member for non-payment of dues, member should be contacted in person to attempt to retain the member. No member should be deleted without written notification.

c. Correction Forms

- (1) Complete and send to National Office any name or address changes of members.
 - (2) Corrections may also be submitted by email to the National Office.
- d. Notify National Office and State Regent of the names and addresses of Local Court officers immediately following election. (See Attachment 13 – New Officer List)

C. Order Supplies

1. All supplies, jewelry, robes, banners, etc. are ordered from the National Office, using the official Order Form (See Attachment 22 – Supply Order Form) by e-mail or on-line if less than a \$50.00 order. E-mail and on-line orders must be placed by the Court Regent or by a Court Officer with the permission of the Regent.
2. A deposit of 50% by court check is required for ALL orders in excess of \$50.00.

D. Reconcile Court Membership Records with National Records

1. Upon receipt of bill for National dues, Regent should give attached information relating to all changes in membership for financial review period to Financial Secretary.
2. Financial Secretary should compare list with Court membership book to ensure the two agree.
3. If discrepancies occur, pay as billed and then contact National Office.
4. Periodically request a membership roster from the National Office to compare with Court records for accuracy and address any discrepancies.

V. **The Treasurer shall**

- A. Receive all monies from Financial Secretary only.
- B. Give receipt to Financial Secretary for all monies given to her.
- C. Pay all bills with approval of Court. **Reminder: Approval is not required from the Court to pay monies assessed by or owed to the National Office and State Court.**
- D. Keep an itemized account of all receipts and disbursements.
- E. Present a Treasurer's Report at regular meeting each month and give copies to the Regent, to the Recording Secretary for the minutes, and retain one for the Treasurer's Book. (See Attachment 23 – Sample of Treasurer's Report)
- F. Make bank deposits immediately. (Deposit slips should be in duplicate.)
- G. Enter deposits in check book.