

Officer Roles and Responsibilities Standard Operating Procedure (SOP)

Montezuma Valley Volunteer Community Service Organization (MVVCSO)

Effective Date: [Insert Date]

Last Reviewed: [Insert Date]

1. Introduction and Purpose

This Standard Operating Procedure (SOP) details the roles and responsibilities of MVVCSO officers as specified in **Article V, Section 1** of the 2025 bylaws. Its purpose is to guide officers—particularly those new to their roles—in fulfilling their duties effectively. This document ensures alignment with MVVCSO’s mission to serve the Ranchita community, complies with California nonprofit laws and IRS 501(c)(3) requirements, and reflects the organization’s North Stars: community focus, transparency, inclusivity, and serving all members. As a publicly available resource, it supports organizational growth by fostering accountability and clarity.

2. Officer Positions

Per **Article V, Section 1** of the bylaws, MVVCSO’s officers are:

- **President**
- **Vice President**
- **Secretary**
- **Treasurer**

The Board may create additional roles (e.g., Vice Treasurer) as needed, with duties defined in this SOP.

3. General Responsibilities of All Officers

All officers must:

- Act in good faith and prioritize MVVCSO’s interests and community needs (California Corporations Code § 5231).

- Avoid conflicts of interest and disclose any potential conflicts per MVVCSO's Conflict of Interest Policy.
 - Participate in annual training on bylaws, legal duties, and ethics.
 - Ensure no actions provide private benefit, per IRS 501(c)(3) rules.
 - Uphold MVVCSO's North Stars in all decisions and interactions.
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4. Officer-Specific Roles and Responsibilities

4.1 President

The President is the Chief Executive Officer (CEO), responsible for leading MVVCSO and representing it to the community.

Duties and Responsibilities:

- **Strategic Leadership:**
 - Work with the Board to create and execute a strategic plan that supports MVVCSO's mission.
 - Example: Lead a planning session to launch a food bank expansion, setting goals and timelines.
- **Board Governance:**
 - Chair all Board meetings, preparing agendas and ensuring decisions are recorded.
 - Step-by-Step:
 1. Draft agenda 7 days before the meeting.
 2. Share with officers for input.
 3. Run the meeting and assign action items.
- **Public Representation:**
 - Act as MVVCSO's spokesperson at events, meetings, and with partners.
 - Scenario: Attend a town hall to discuss MVVCSO's role in emergency preparedness, answering questions clearly.
- **Compliance:**
 - Ensure MVVCSO follows bylaws, California laws, and IRS rules.
 - Oversee the annual report's creation and public release.

Legal Obligations:

- Avoid private benefit (IRS 501(c)(3)).
 - Fulfill fiduciary duties of care, loyalty, and obedience (California Corporations Code § 5231).
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4.2 Vice President

The Vice President assists the President and ensures continuity if the President is unavailable.

Duties and Responsibilities:

- **Support to the President:**
 - Help with strategic planning and community outreach.
 - Example: Co-lead a fundraiser, managing volunteers while the President handles donors.
- **Succession:**
 - Take over if the President is absent, running meetings or representing MVVCSO.
 - Stay informed on all initiatives to step in seamlessly.
- **Special Projects:**
 - Manage tasks assigned by the Board, like organizing a volunteer training day.
 - Step-by-Step:
 1. Plan the event with a timeline.
 2. Coordinate with the Secretary for notices.
 3. Report outcomes to the Board.

Legal Obligations:

- Follow fiduciary duties and avoid conflicts of interest (California Corporations Code § 5231).
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4.3 Secretary

The Secretary keeps MVVCSO's records and ensures transparency through documentation.

Duties and Responsibilities:

- **Meeting Minutes:**
 - Record detailed minutes at all meetings, including decisions and votes.
 - Step-by-Step:
 1. Take notes during the meeting.
 2. Draft minutes within 7 days.
 3. Share with the Board, then post publicly within 14 days.
- **Record-Keeping:**
 - Store bylaws, minutes, and resolutions securely and make them accessible.
 - Example: Use a locked filing cabinet and digital backups, ensuring member access on request.
- **Correspondence:**
 - Send meeting notices (7 days for regular, 48 hours for special) in accessible formats (e.g., large print).

Legal Obligations:

- Comply with record-keeping laws (California Corporations Code § 6320).
 - Protect member data (California Consumer Privacy Act).
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4.4 Treasurer

The Treasurer manages MVVCSO's finances, ensuring transparency and compliance.

Duties and Responsibilities:

- **Financial Management:**
 - Track all income and expenses, reconciling accounts monthly.
 - Example: Record a \$500 donation and ensure it's deposited within 3 days.
- **Budgeting and Reporting:**
 - Draft the annual budget by November 30 and present monthly financial updates.
 - Step-by-Step:
 1. Gather expense data.
 2. Draft budget with the Board.
 3. Submit for approval.
- **Compliance:**
 - File IRS Form 990 and oversee audits if required.
 - Ensure restricted funds (e.g., grants) are used correctly.

Legal Obligations:

- Prevent private benefit (IRS 501(c)(3)).
 - Uphold fiduciary duties (California Corporations Code § 5231).
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5. Public Availability

- This SOP is available at the food bank, on community boards, and online (if possible).
 - Accessible formats (e.g., Spanish, large print) are provided on request.
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6. Training and Growth

- Officers attend annual training on bylaws and duties.
 - New officers are mentored by experienced ones to build skills and confidence.
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7. Review Process

- The Board reviews this SOP yearly by January 31, updating it with a majority vote after 30 days' public notice.

This SOP equips MVVCSO officers to lead effectively, ensuring the organization thrives while serving Ranchita with transparency and inclusivity.