



RTO
ERO

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together
Ensemble pour
un avenir meilleur

District 23
North York

District 23 North York Role Descriptions

Approved by the Executive on June, 2023

(Please destroy previous versions.)

APPENDIX

District 23, North York Role Descriptions

In addition to the Duties of the members of the Executive as delineated in Article 2 and Article 3 of the Governance Document, the following duties are to be performed by the members of the Executive.

(This does not form part of the Governance Document.)

a) Past President

- Attend Executive meetings.
- Chair the Nominating Committee and prepare the slate of candidates for the Executive for the upcoming Annual Meeting.
- Act as a Corporate Member at the Fall Forum and Spring Forum/Annual Meeting.
- Be prepared to speak to any District resolution at the Fall Forum and Spring Forum/Annual Meeting.
- Be prepared to perform the duties of the President in the absence of the President.
- Support the President.

b) President

- Oversee all activities of the Executive at the District level.
- Lead and ensure that the work of the District aligns with RTOERO's Strategic Plan.
- Preside over Executive Meetings, Annual Meeting, luncheons, and receptions.
- Attend all District Executive meetings executing responsibilities as required.
- Convene and chair regular and special meetings of the District Executive and membership meetings.
- Serve as an ex-officio member on all District Standing Committees.
- Ensure the goals of the District are being met and that the District abides by its established District Governance policies.
- Contribute to STONY Bridges.
- Represent the District at Toronto Districts Council.
- Attend as Corporate Member the RTOERO Fall Forum and Spring Forum/Annual Meeting (AM) and speak to resolutions put forth by the District.
- Act as a Signing Officer for the District.
- Prepare District's Annual Report.

c) First Vice President

- Attend Executive meetings.
- Reserve a location for Executive meetings, usually held on the second Wednesday of the month from September to June.
- Be responsible, with the Second Vice President, for the Speaker's Program. Prepare a summary of the speaker and topic for inclusion in STONY Bridges. Arrange for introductions and thanks of speakers.
- Attend as many District events as possible to host speakers, guests, and members who attend
- Assume the role and duties of the President in their absence or if they can no longer continue.
- Assist the President as needed.
- Attend as an Observer at the RTOERO Fall Forum and Spring Forum/Annual Meeting.

- Represent the District by attending meetings of the Toronto Districts Council.

d) Second Vice President

- Attend Executive meetings.
- Chair the Awards Committee.
- Be responsible, with the First Vice President, for the Speaker's Program. Arrange for introductions and thanks of speakers. Prepare a summary of the speaker and topic for inclusion in STONY Bridges.
- Attend meetings of the Toronto Districts Council as an alternate when required.
- Attend as many District events as possible to host speakers, guests, and members.
- Attend as an Observer at the RTOERO Fall Forum and Spring Forum/Annual Meeting.

e) Secretary

- Attend Executive meetings.
- Record the attendance of Executive members for each meeting.
- Record Minutes of meetings. Only pertinent information needs to be recorded. All motions must be recorded with mover, seconder, and results.
- Collect reports of executives, committees, Treasurer, and special reports, at each meeting. The reports should be kept with the Minutes of the relevant meeting.
- Minutes are sent electronically.
- Record Minutes of the Annual Meeting. All signed Executive and Committee annual reports should be submitted to the Secretary before the Annual Meeting.
- Prepare a list of the new Executive members after the Annual Meeting and distribute copies to all.
- Assist the President and the Executive in whatever capacity required for the efficient functioning of the organization.
- Maintain a record which contains the Minutes for each Executive Meeting and Annual Meeting. Additional reports should be filed with the relevant set of Minutes. These will be stored electronically and provided to the Archivist annually.
- Be prepared to attend as an Observer at the RTOERO Fall Forum and Spring Forum/Annual Meeting.
- Act as a Signing Officer for the District.

f) Treasurer

- Attend Executive Meetings and provide a financial statement at each meeting.
- Maintain in a separate account in an accredited financial institution all monies accruing to the District.
- Maintain financial records in QuickBooks in the format established by RTOERO.
- Receive the annual rebate of monies from RTOERO.
- Receive and deposit monies generated by District activities.
- Pay all invoices as directed by the Executive.
- Present an annual District Financial Statement for the previous year, reviewed by at least two District Executive members, to the Executive for approval at least one month before the District Annual Meeting.
- Prepare an annual budget for approval of the Executive.
- Send the Annual District Financial Statement to the RTOERO Office as required by RTOERO Office and approved by the Executive.

- Liaise with the Assistant Treasurer.
- Be a signing officer for the District.
- Liaise with RTOERO Office personnel designated by RTOERO Office.

g) Assistant Treasurer

- Attend the Executive meetings.
- Work with the Trip & Event Conveners to receive all monies paid by those who wish to participate in trips during the year and pay by cheque.
- Be one of the signing officers if asked by the Executive.
- Along with the Treasurer, receive money from Conveners' activities and ensure these monies are deposited to the District's bank account.

h) Archivist Convener

- Attend Executive meetings.
- Add to the electronic pictorial history of District 23 by working with the Photographer.
- Collect and store photos from other Conveners and members of District 23.
- Submit archival photos for each STONY Bridges publication.
- Organize archival material and photographs for celebrations/luncheons.
- Maintain electronic copies of District 23 Executive meeting and Annual Meeting minutes.
- Maintain electronic copies of District 23 STONY Bridges, e-newsletters, and central District e-mails.
- Keep an electronic copy of the RTOERO Governance document.
- Maintain physical archival material in District 23 storage cupboard in Willowdale United Church.

i) Benefits Convener

- The Health Representative is responsible for promoting and coordinating opportunities related to health and wellness within the District. They may also act as a liaison between an RTOERO Group Insurance member and the plan administrator or RTOERO Staff.
- Attend District 23 Executive Meetings.
- Attend the District/Unit Health Representative Workshop and share key learnings as appropriate.
- Report important information regarding plans to the Executive and share with members through STONY Bridges and e-Newsletter.
- Support the members in their healthy, active retirement journey by creating and sharing health and wellness-related content. This could include Newsletter, District website, social media, or workshops. For RTOERO Group Insurance Plans sessions, an RTOERO staff member or a Johnson Consultant will deliver the seminar.
- Become familiar with the RTOERO group insurance program by reviewing resources, including the: RTOERO Insurance booklet, Communiqué, Benefit Committee meeting highlights and D/UHR manual.
- Reroute plan members who require assistance with insurance-related matters to contact our Plan Administrator at Johnson Inc.
- Redirect escalations or feedback involving our insurance policy or partner/provider (Johnson, Global Excel or Teledoc) to the RTOERO Health Benefits team.

j) Book Club Convener

- Attend Executive meetings.
- Be responsible for coordinating dates, locations, times, and organization of monthly meetings.
- Be responsible for the selection of book titles for meetings.
- Provide the book titles and descriptions on time for publication in STONY Bridges and the e-Newsletter.

k) Bridge Convener

- Attend Executive meetings.
- Have tables ready for play at 1:00 p.m. on Bridge days.
- Obtain playing cards, scorecards, and pencils from the Willowdale United Church basement locker.
- Distribute cards, scorecards, and pencils to each table.
- Put away all tables and chairs.
- Return all materials to the basement lockers after Bridge.
- Ensure each participant pays an entry fee and submits net proceeds to the Treasurer.
- Provide name tags as appropriate.
- Purchase new playing cards and bidding box cards as needed and print scorecards.
- Purchase cookies, coffee, cream, sugar, and cups, if appropriate.
- Prepare coffee in the kitchen before 1:00 p.m. and ensure everything is cleaned up before leaving.
- Liaise with the church secretary and caretaker.
- Provide instruction for new or inexperienced players.
- Encourage attendees to provide contact information so the Convener can inform the group of last-minute schedule changes. Convener maintains an e-mail "Bridge Contact" list.
- Keep a key to the supply cabinet. Ensure that at least one other person has a key in case of absence or illness and is prepared to step in and take charge as necessary. The Willowdale United Church secretary has a key which can be borrowed should both key holders be absent at short notice.
- The Bridge Convener and the Treasurer will cooperate in communicating with the church concerning dates and costs for renting the facilities. The yearly contract should be submitted to the Treasurer for approval. We have three large metal storage cabinets in the upper basement of the church. These contain archives and AV equipment in addition to Bridge supplies.
- Provide an article for each edition of STONY Bridges.

l) Communications Convener

- Attend Executive meetings.
- Create and send out monthly e-Blasts to the District 23 membership.
- Manage the Facebook page.
- Maintain a Calendar of Events.
- Provide an article for each edition of STONY Bridges.

m) Community Services Grant & RTOERO Scholarship Convener

- Attend Executive Meetings
- Gather suggestions for grant applications from January to March

- Follow up on these suggestions by contacting any given organization. Prepare a summary and a comparison of information for the Executive.
- Present possible organizations to the Executive. The Executive will vote on the chosen organization for the annual project. The Executive will support the chosen organization through various means.
- Complete and apply by the stipulated deadline, sending a copy to the District Executive.
- Oversee the project throughout the year, invite the contact person to District related functions, promote volunteerism between the organization and our members, and keep the membership informed about the project's progress.
- Prepare and submit the interim and final reports to RTOERO, with a copy to the District Executive.
- Provide an article for each edition of STONY Bridges.
- Promote the RTOERO Scholarship.

n) Cycling Convener

- Attend Executive meetings.
- Be responsible for coordinating the dates, locations, times, and organization of the Spring and Fall cycling trips.
- Ensure the Acknowledgement, Waiver, and Release Form has current information and is signed by the participants.
- Keep the above form on file.
- Coordinate washroom availability with the Parks Supervisor where District 23 cycles.
- Provide the above information for publication in STONY Bridges on time.

o) Governance Convener

- Attend Executive Meetings.
- Shall serve on the Governance Committee, activated by the Executive as required, and shall be composed of the President, Past President and First Vice President, the Governance Convener and one other member of the Executive. The Committee will recommend to the Executive changes in the District Governance document.
- Become familiar with the RTOERO bylaws so the Convener can be a resource to the Executive in the interpretation of this document and be able to make recommendations for changes.

p) Goodwill Convener

- Attend Executive meetings.
- Oversee the annual donations that acknowledge birthdays and bereavements.
- Arrange for those celebrating a 70th and 90th birthday along with a caregiver, if needed to attend the Spring luncheon.
- Recognize the Goodwill volunteers.
- Provide an article for each edition of STONY Bridges.
- Oversee and report on the sub-committees:
 - (1) Send Card Committee:
 - Send notes and cards to District members at milestone birthdays and as required.
 - Send sympathy cards to members' families.
 - Send Get-Well and Thinking of You cards as appropriate.
 - (2) Telephone Committee:

- Make wellness calls.

q) Have-A-Java Convener

- Attend Executive meetings.
- Organize monthly coffee get-togethers.
- Distribute a subsidy as appropriate,
- Provide the above information for publication in STONY Bridges on time.

r) Member-at-Large

- Carry out or assist with matters as assigned by the President/Executive.

s) Membership Convener

- Attend Executive meetings and attend appropriate RTOERO workshops and meetings.
- Assist RTOERO in keeping the District membership list of RTOERO retired and Actively Employed Members current and accurate and provide updates on membership data and changes to the Executive.
- Initiate a program to contact each new District Member to welcome them to the District, answer any questions, and encourage participation.
- Make recommendations to the Executive regarding new services that might be provided to the members.
- Keep the Membership current on the new District and the deceased members through STONY Bridges.
- Work closely with the Recruitment Convener.

t) Needlework And Crafts Convener

- Attend Executive meetings.
- Liaise with the Executive and appropriate Conveners depending on the project/event
- Assist and be part of the Service to Others Project when appropriate.
- Organize monthly meetings and oversee projects undertaken.
- Provide an article for each edition of STONY Bridges.

u) Newsletter Layout and Design Editor

- Attend Executive meetings.
- Produce three issues of STONY BRIDGES per year as directed by the Executive - August, November, and March.
- Liaise with the Newsletter Associate Editors, Distribution and Photographer Conveners, writers, and artists. Set timelines and due dates in consultation with Associate Editors.
- Plan and execute layout and design.
- Produce and deliver originals to the printer with printing instructions after review by the Associate Editors and contributors.
- Evaluate each publication and plan for changes.
- Submit report in May for the AM on behalf of the Newsletter Group
- Follow Editorial Policies:
 - No commercial advertising is to be included.
 - No payment is made for work done by District members, but reimbursement is provided for supplies such as paper, ink cartridges, etc.

- The Editorial Team, in conjunction with the President, reserves the right to edit, condense or reject letters or submissions.
- Publication Dates and Deadlines

<u>Newsletters</u>	<u>Submissions</u>	<u>To Printer By</u>	<u>To Members By</u>
November	September 15	End of October	Mid-November
March	January 15	End of February	Mid-March
August	June 15	End of July	Mid-August

- Follow Mission Statement for STONY Bridges:
 - To communicate to the members of District 23, North York, the activities, opportunities, news, and relevant information regularly.
 - Focus on key initiatives of the District.
 - Enhance long-term interaction and planning - invite feedback, participation, and submissions from the membership.
 - Invite Conveners and Table Officers to make regular submissions.
- Design and publish the Annual Meeting Reports Booklet.

v) **Newsletter Associate Editors**

- Attend Executive meetings.
- Produce three issues of STONY Bridges per year as directed by the Executive - August, November, and March.
- Liaise with the magazine Editor, Distribution Convener and Executive Members, photographers, writers, and artists. Set timelines and due dates in consultation with Associate Editors
- Along with Editor, develop a list of criteria for submission of entries to the STONY Bridges newsletter.
- Follow up with Conveners for timely submission of STONY Bridges deadlines/reports.
- Edit submissions in conjunction with contributors. In conjunction with the President, the Editorial Team, reserves the right to edit, condense or reject letters or submissions.
- Produce, along with Editor, the final draft with printing instructions after review by the Editorial Team.
- Evaluate each publication and plan for changes.
- Assist Newsletter Distribution Convener with the receipt of newsletters from Printing Services and assist with the Distribution when necessary.

w) **Newsletter Distribution Convener**

- Attend Executive meetings.
- Keep extra STONY Bridges on hand for distribution to new members at the Champagne Breakfast and Holiday Season luncheon. Deliver a copy of STONY Bridges to the secretary at Willowdale United Church. Send out copies as appropriate to the four Toronto School Boards. Provide extra copies as requested by the Membership and Recruitment Conveners and Executive.
- Submit a report at the meeting following a newsletter distribution.
- Submit the receipts for expenses to the Treasurer.
- Assist the Editor in compiling the Newsletter Annual Report for the Annual General meeting.
- Order extra copies of the Newsletter as requested by the Membership and Recruitment Conveners and Executive.

- Procedures For Mailing:
- E-mail the RTOERO office at 416-962-9463 for a list of all District members to be sent to the mailing service (Perkins).
- Order the required number of Newsletters for members and extras. Submit the numbers to the printer. Arrange a delivery date with the printer and mailing service.
- Have the mailing service ship the extra copies to the Convener.

x) Photography Convener

- Attend Executive Meetings.
- Take District 23 photos as requested.
- Provide photos for publications and events with copies to Archivist.

y) Pole Walkers Convener

- Attend Executive meetings.
- Organize the monthly walks.
- Maintain a membership list of participants.
- Provide the dates, times, and locations for publication and participants.

z) Political Advocacy Convener

- Attend Executive meetings.
- Maintain a non-partisan balanced point of view.
- Take firm positions on issues following RTOERO directions.
- Encourage and foster a positive attitude toward education workers.
- Attend events and communicate with RTOERO Political Advocacy Committee (PAC).
- Organize action on important issues wherever possible and appropriate.
- Make every attempt to publicize the activities and contributions of District 23 and RTOERO.
- Present to the RTOERO PAC issues of interest to the District.
- Promote RTOERO advocacy efforts.
- Provide an article for each edition of STONY Bridges.

aa) Recruitment Convener

- Attend Executive meetings.
- Attend RTOERO workshops on Recruitment.
- Work with Toronto Districts Council and RTOERO in developing a coordinated recruitment program.
- In coordination with the Membership and Political Advocacy Conveners, develop ongoing recruitment strategies, which may be reviewed and updated annually just before the AM.
- Be involved with and participate in the Champagne Breakfast.
- Plan and organize the sending of information packages during the school year to potential retirees/members.
- Develop strategies for attracting new members to District 23.
- Provide an article for each edition of STONY Bridges.

bb) Social Convener

- Attend Executive meetings.
- Establish a Social Committee

- Be responsible for the Reception for the New Retirees, the Holiday Season, and the Annual Meeting/Spring Luncheons.
- Ensure all costs fall within the approved budget.
- Obtain a contract well in advance of the events.
- Establish an appropriate ‘cost per person’.
- Present and report at the next Executive meeting and request the recommended ‘cost per person’ approval.
- Allow sufficient time for the details to be posted in STONY Bridges.
- With the Social Committee, attend to the following for the luncheons:
 - Select a place and choose the menu.
 - Choose and book the entertainment.
 - Prepare a financial statement of costs for the Executive.
 - Prepare a notice of the activities (including the date, time, place, cost, menu, etc.) for publication.
 - Arrange head table, number of guests, table arrangements, door prizes, flowers, audio system, centrepieces for individual tables, and a piano, if necessary.
 - Select people for introduction and ‘thank you’ speeches.
 - Arrange for the Photographer
- Receive all funds paid by those who wish to participate in these events and arrange for deposits of said monies. Give all funds received to the Treasurer for deposit.
- Present up-to-date lists of participants and the amount paid by each to the Treasurer after the deposit has been made.

cc) Strollers Convener

- Attend Executive Meetings
- Be responsible for coordinating the dates, locations, times, and organization of the monthly walks.
- Provide the details for publication in STONY Bridges on time.

dd) Technology Convener

- Attend Executive meetings.
- Promote members' use of personal electronic technology to maintain or improve their quality of life. Note: Personal electronic technology is understood to include personal computers, tablets, smartphones, and related devices.
- Explore ways to help members learn to use the technology effectively.
- Find new uses for the devices, find new Internet resources, and find ways to use the devices in the pursuit of other activities.
- Host meetings of members who share an interest in the technology,
- Provide guidance or assistance to the Executive in using technology to carry out Executive duties.
- Provide an article for each edition of Stony Bridges.

ee) Trips Convener

- Attend Executive Meetings
- Plan for group events and Executive approval.
- Contact a travel agent or box office.
- Obtain a contract well in advance of the event.

- Establish an appropriate 'cost per person'.
- Present the report to the next Executive Meeting and request the 'cost per person' approval.. There will be a motion passed by the Executive approving each trip.
- Prepare information for publication, including the registration process.
- Attend to the distribution of tickets.

ff) Webmaster Convener

- Attend Executive meetings.
- Liaise with Toronto Districts Council (TDC) Webmaster and RTOERO CIO on behalf of the Executive.
- Post articles and other items to District 23, North York Website, on behalf of the District.
- Design and develop web forms for event registration and payment.
- Attend on behalf of the District such seminars on website maintenance as deemed necessary by the Executive or Webmaster.
- Maintain a current electronic copy of Stony Bridges on the website.
- Work with the Magazine and Magazine Distribution Committees to ensure that those District members wishing to receive an electronic copy of the magazine will receive same.
- Manage and administer the District Twitter account.
- Provide an article for each edition of STONY Bridges.
- Stay abreast of new software releases and functionality.
- Demonstrate intermediate to advanced computer skills, and competency in text, photo, and video editing software.
- Be familiar with relevant software such as WordPress, Gravity Forms, HTML, JavaScript, Microsoft Office, Adobe software (InDesign, Photoshop, Illustrator, Premiere, Bridge and Acrobat), Handbrake and Twitter.