



AEGEE Toolkit

Board Roles Knowledge Transfer Template



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For all general questions about information, communication within your area, European projects and initiatives please contact your Network Commissioner whom you can find herein.

Introduction: The Board Roles Knowledge Transfer Template

This document serves as a checklist and a template to inform prospective board members about their basic role, including their responsibilities towards AEGEE-Europe, and help them create a basic knowledge transfer structure.

Being a board members means to have many responsibilities. Here you can find some general advice on how to best conduct your board term:

1. Before you decide to work in a board please review your plans for the coming year and make sure you can sacrifice enough time (up to one year, depending on your board period in your local) for AEGEE. If you plan also to commit to other activities, make sure you will have enough time and energy for everything. It is better to do one thing properly than starting more projects and not finishing them!

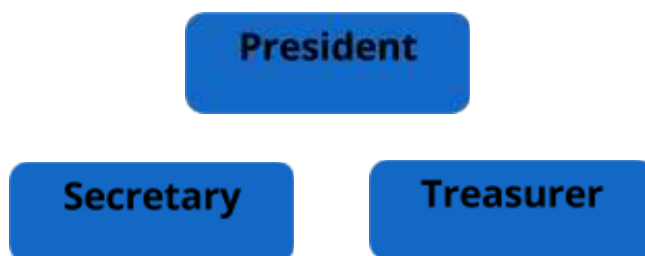
2. Before beginning your work as a board member, make sure that the knowledge of the previous board is passed on to you. To ensure that a steady flow of information is sustained within your Antenna, organize a transitional period where both the old and new boards work together for some time (e.g. one month).

Learning by doing might be a good approach, but also a time consuming one. A complete knowledge transfer will guide you to fulfil all tasks smoothly.

3. Together with your board team develop a plan of activities and strategies for at least half of your term where you clearly divide tasks.

4. Remember, you are a team, not a group of solo players! Do not forget the importance of communication. Set up regular (e.g. weekly) board meetings during which you inform each other about the current situation concerning your function and AEGEE in general so that your colleagues have an overview of what is going on.
5. Do not try to do everything by yourself. Accept help from other (board) members.
6. Do your best to find as much time as possible to talk personally to your local members. Only in such a way will you have a chance to get to know them better; their abilities, plans, expectations, hobbies. This information will not only help you to work effectively in a team, but also to motivate and support each other.
7. Try to put your personal dislikes aside. Bad personal relations among board members will most likely affect your work. Try to discuss the problems, avoid accusing each other and bringing up the past.

In the following section you will find the tasks descriptions of the most important board positions. This toolkit is meant to offer a set of basic guidelines and suggestions which aim to provide you with a general framework for operating a local. However this manual may not cover all aspects and should be adjusted to local circumstances. We encourage you to add any further information that is specific to your antenna in the spaces provided subsequent to each position. Also, remember that your Network Commissioner is always there to help you, should you encounter any problems or are in need of advice.



The three basic positions which are essential for creating a board are President, Secretary and Treasurer.

I. President

The President runs and coordinates the association, leads the weekly meetings and keeps an overview of the activities carried out in the local. Moreover, he fulfills representative tasks with focus on the association's external representation and holds the main responsibility for the local.

1. Representation

The President should have a strong vision of AEGEE which he represents towards the members of the local in the whole AEGEE Network and towards external stakeholders.



Tasks:

- Lead weekly meetings with active members and build a common mission.
- Keep contact with local patrons and inform them about your activities and achievements.
- Assure professional representation of the antenna towards the university, other organizations, partners and sponsors.
- Show presence by personally signing important documents and attending important events.
- Make sure to keep contact details and all information about your antenna updated in the [Intranet](#).

2. Administration

The President also has to fulfill certain administrative tasks concerning local authorities and the AEGEE Network.

Tasks:

- Register your local as an official association at the register court and also record changes in the positions of president, secretary, treasurer and vice president as they may also be entitled to represent your local legally.
- Administer the statutes of your association, initiate changes if needed and make sure it is always up-to-date.
- Register your antenna as an official initiative at your university and provide the responsible body with the current contact details.
- Create and sign contracts for possible partnerships.
- Find or update a proper insurance for your association.
- Keep an overview of the activities in your local and make sure that the Antenna Criteria are fulfilled.
- Submit an activity report for your Antenna once a year (the deadlines are announced on the mailing list BOARDINF-L).
- Prepare and lead the general members assembly, preferably every six months.
- You can issue certificates for active members about their efforts as an extra incentive.
- Be informed about developments in the network and regularly check the mailing lists <http://www.zeus.aegEE.org/portal/get-involved/mailling-lists/>.

3. Leader of a Team

The President is responsible to build a team out of the different board members, make them work together efficiently and keep them motivated.

Tasks:

- Initiate and prepare weekly board meetings.
- Coordinate the work of all board members.
- Keep an overview of the work that needs to be done, clearly divide responsibilities and delegate tasks.
- Create a timeline and if needed remind your board members of upcoming deadlines.
- Build a team with your board members and create a "Team Spirit".
- Motivate the other board members, support and advise them if necessary.
- Stay impartial and try to mediate if conflicts appear between board members.
- Anticipate possible problems and try to cope with them at an early stage.
- You have the final responsibility and have to do all work that has not been done by others.

Space for adding specific information about your local

II. Secretary

The Secretary is in charge of most administrative procedures of the association

Tasks:

- Takes care of internal communication via mailing list.
- Usually in contact with other Antennae and with AEGEE-Europe.
- Takes minutes at board meetings/ local meetings.
- Submits the local's Members List to AEGEE-Europe before each Agora (notifications will be sent via mailing list BOARDINF-L) and handles Agora/ EPM applications.
- Announces meetings, local Agorae.
- Contact person for ordinary members.
- Together with the president registers your local as an official association at the register court and at the university stating changes in the positions of president, secretary, treasurer and vice president as they may also be entitled to represent your local legally.
- Takes care of members' database.
- Takes care of registration and updating the local documents in the court.



Space for adding specific information about your local

III. Treasurer

The Treasurer administers the association's bank account, the cost units, the barge and the membership fees, keeps records of all financial transactions and discloses the association's financial situation.



Tasks:

- Account-keeping and payment of all current invoices.
- Compile a profit and loss statement and a balance sheet.
- Collect all receipts and bills.
- Check and pay reimbursements for your members.
- Give a report of the association's financial situation at the local Agora.
 - If you hold the status of a nonprofit organization make a tax return.
- Submit a financial report for AEGEE Europe once a year on [Members Portal](#) (on <http://www.zeus.aegee.org/portal/tag/financial-report/>, deadline is announced on the BOARDINF-L mailing list).
- Collect membership fees.
- Pay AEGEE-Europe membership fees.
- Budgeting, examination of budget plans and approval of spendings.

For more detailed information about treasury please read the [Treasury toolkit](#).

Space for adding specific information about your local

Besides President, Secretary and Treasurer a board can consist of more members holding different positions. Adding them will allow to divide the workload and specialise in specific tasks. The most important areas that board members should work on are: Public Relations, Human Resources and Fundraising.

IV. Public Relations Responsible

As the name says, the Public Relations Responsible is given the task to not only create promotional material for the events organized by the Antenna, but furthermore maintain relations with external media platforms where the work of AEGEE may also be featured.

Tasks:

- Outline the PR strategy.
- Take care of the image of the organization.
- Create PR material and merchandising (according to AEGEE-Europe Visual Identity <http://www.zeus.aegEE.org/portal/resources/pr-materials/>).
- Contact person to the media (newspapers, radio, TV).
- Send out press releases.
- Organize presentations of AEGEE.



For more detailed information about PR please read the [PR toolkit](#) on Members Portal.

V. Human Resources Responsible

Your members are the basis of your Antenna, take good care of them. As Human Resource Responsible your are in charge of managing, recruiting and training of the members of your local. This includes designing activities for recruiting new members, organizing trainings as well as being a mentor and source of advice for them in case of conflict.



Tasks:

- Responsible for the communication inside the association.
- Takes care of organizing local trainings.
- Responsible for Team-Building activities
- Helps to create project coordination teams.
- Focuses on recruitment strategy.
- Ensures regular evaluation of members/project teams and the board.
- Keeps track of former members and creates Alumni database for networking purposes.

For more detailed information about Human Resources strategy, please read the [toolkit on HR cycle](#) on Members Portal.

Space for adding specific information about your local

VI. Fundraising Responsible

The Fundraising Responsible is in charge of creating a strategy for establishing and maintaining relations to partners for the purpose of supporting your activities (either in kind or in terms of financial contributions). The aim is to create a solid base of resources which is useful in executing events, projects or other activities related to the work of the Antenna.



Tasks:

- Outline the fundraising strategy.
- Take care of finding resources for local's activities.
- Update companies' and funds' database.
- Create Fundraising templates for contacting partners and companies.

For more detailed information about Public and Private Fundraising and Fundraising strategies strategy please read the [Fundraising toolkit](#) on Members Portal.

Space for adding specific information about your local

Some other positions can be added to a board depending on a local's needs and its specificity:

VII. IT Responsible

The IT Responsible is in charge of maintaining the computer systems and networks of your organisation. As such, the tasks include installing and configuring computer systems, diagnosing hardware and software faults as well as solve technical problems.



Tasks:

- Take care of the homepage (more information how to host the homepage via www.aegee.org and templates for designing your homepage are available at <http://www.zeus.aegee.org/portal/resources/it-resources/>).
- Provide support for technical questions.
- Ensure the functioning of IT ware of the association (computer, offices, cameras, ...).

Space for adding specific information about your local

VIII. Erasmus Responsible

The Erasmus Responsible cares for the incoming international students, organizes cultural as well as social activities for them and is their first point of contact in case they should face any problems. Please note that AEGEE is not aiming to compete with the work of ESN (Erasmus Student Network), but encouraging you to start a cooperation with them, should you wish to take care of Erasmus students and ESN also exists in the same city.



Tasks:

- Build up or maintain contact to the responsible administrative bodies and the person officially in charge of the international students.
- Try to cooperate with other local Erasmus initiatives.
- If you receive university funds for taking care of the Erasmus students make sure to collect receipts and attendance lists of the activities you organized for them.
- Form a team of interested members of your local to plan and organize activities together in order to include them in your Erasmus work.
- Organize a welcome week for international students to make it easier for them to get along at your university and in your city.
- Show presence also beyond AEGEE activities to be a visible contact person for international students.
- Use your creativity to plan activities for the Erasmus students (activities can be parties, short trips, cultural evenings, presentations and everything else you would like to do).

IX. Other local structures

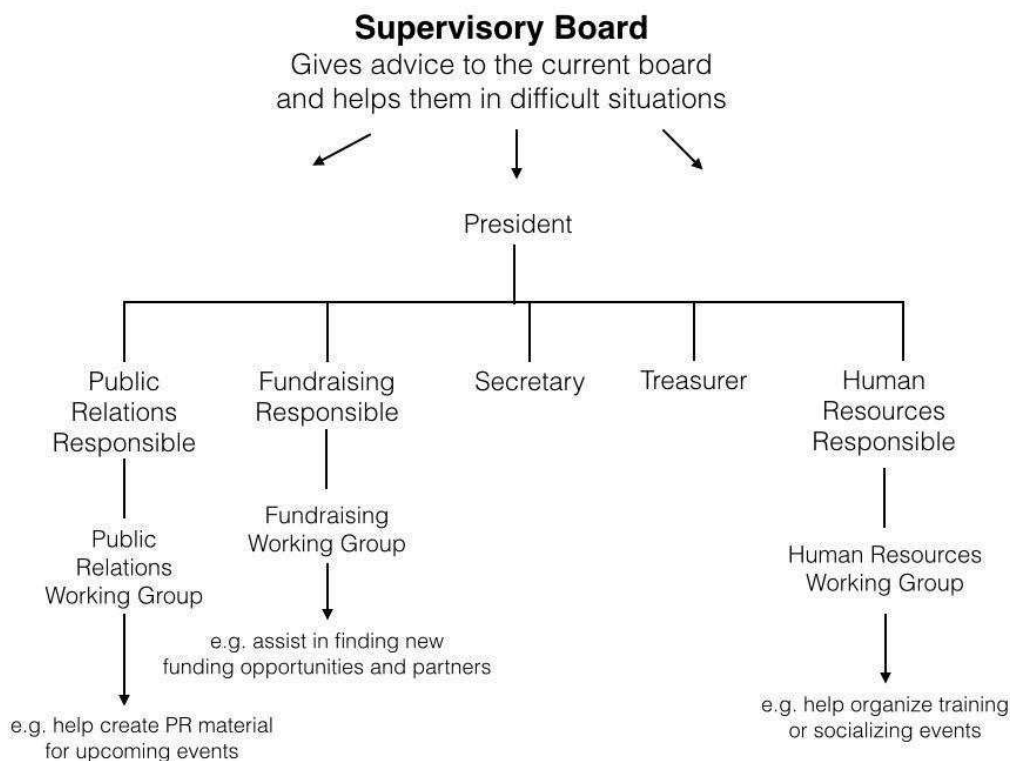
- i. Supervisory Board - it's a body consisting mostly of three people who supervise and monitor the work of a board. A supervisory board can provide help and guidance in cases of legal matters, grant applications and internal conflict solving. In certain countries the existence of such a body is often required by law for associations.

- ii. Working Groups - It might be interesting for you to establish Working Groups that work constantly throughout the term. For example a Human Resources Working Group could be created to support the Human Resources Responsible in organizing events for the members. In general, Working Groups specifically support the functioning of a local in a certain field and enable its members to develop their skills. Some areas which could especially benefit from the support of Working Groups would be Human Resources, Public Relations, Fundraising and IT. Each Working Group is led by the board member holding the respective position.

X. Organizational Structure

Each board can be structured in different ways. Ultimately, how you organize yourselves within your board is up to you. But please make sure that all board members are aware and agree with the ways in which the tasks and responsibilities are divided within the team. The illustration shown below provides an example of how a board can be organized internally, as well as receive the support of working groups, which function to involve members in the work of the board. Even though the Supervisory Board is shown above the board, this does not mean that it has some sort of power above the current board. As explained in the preceding section, the Supervisory Board takes a consultative role towards the work of the current board and antenna.

Feel free to also sketch an illustration showing how your board and antenna is organized. This exercise may help you to figure out the strengths and weaknesses of your board as well as antenna.



This figure is not limited to the displayed board positions. It only illustrates an example of how a local board can be organized.

XI. Team Roles

It does not take years of experience to notice that each person behaves differently when working in a team. Some people might start working right away, while others spend more time planning the steps they will take or even delegate most tasks to others. After all, each person has different working styles that come with certain strengths and weaknesses. The Belbin Test (www.belbin.com) can help to figure out which team role you and your team mates exhibit. When looking at the different roles, please keep in mind that one person always










displays characteristics of more than one team role. Once you are aware of the different team behaviors within your board or other group, you can start adjusting to their strengths and weaknesses. Ideally, a team balance can be created when its members are willing to accept and adjust to each other's working styles and needs.

Please find the summary descriptions of the team roles according to the Belbin Test on page 26.

If you are interested in organizing a training on teambuilding for your board or antenna, please contact AEGEE's pool of trainers, the AEGEE Academy:
aegee.academy.board@gmail.com

BELBIN®

Team Role Summary Descriptions

Team Role	Contribution	Allowable Weaknesses
Plant 	Creative, imaginative, free-thinking. Generates ideas and solves difficult problems.	Ignores incidentals. Too preoccupied to communicate effectively.
Resource Investigator 	Outgoing, enthusiastic, communicative. Explores opportunities and develops contacts.	Over-optimistic. Loses interest once initial enthusiasm has passed.
Co-ordinator 	Mature, confident, identifies talent. Clarifies goals. Delegates effectively.	Can be seen as manipulative. Offloads own share of the work.
Shaper 	Challenging, dynamic, thrives on pressure. Has the drive and courage to overcome obstacles.	Prone to provocation. Offends people's feelings.
Monitor Evaluator 	Sober, strategic and discerning. Sees all options and judges accurately.	Lacks drive and ability to inspire others. Can be overly critical.
Teamworker 	Co-operative, perceptive and diplomatic. Listens and averts friction.	Indecisive in crunch situations. Avoids confrontation.
Implementer 	Practical, reliable, efficient. Turns ideas into actions and organises work that needs to be done.	Somewhat inflexible. Slow to respond to new possibilities.
Completer Finisher 	Painstaking, conscientious, anxious. Searches out errors. Polishes and perfects.	Inclined to worry unduly. Reluctant to delegate.
Specialist 	Single-minded, self-starting, dedicated. Provides knowledge and skills in rare supply.	Contributes only on a narrow front. Dwells on technicalities.



In case you have any questions regarding the content of this toolkit, please contact your Network Commissioner or network@aegee.org.