



American Osteopathic College of Occupational and Preventive Medicine

Job Description of the Executive Director (JD-01)

Effective Date: _____

Next Review Date: _____ Reviewer(s): _____

Dates of Revisions: _____

Purpose: To support the Board of Trustees and the American Osteopathic College of Occupational and Preventive Medicine (AOCOPM) in maintaining credibility as a not-for-profit corporate organization; to professionally represent the College at pertinent business functions; to ensure that membership needs are met through the processing of information to the Board; and to manage office functions to ensure the association meets the needs of the Board, Committees, affiliates, and members.

Responsibilities:

1. Administration

- 1.1. Support the secretarial needs of the AOCOPM.
- 1.2. Conduct the normal daily business of the AOCOPM.
- 1.3. Be responsible for all manuscripts, documents and records of the College and be prepared to report and produce the content of those papers when called upon to do so.
- 1.4. Ensure the AOCOPM complies with all regulatory requirements by filing all required documentation in a timely manner.
- 1.5. Complete and support all tasks designed to ensure that the AOCOPM achieves its goals.
- 1.6. Other duties as deemed necessary for the accurate operation of the College.

2. Membership

- 2.1. Research potential membership benefits and present them to the Board of Trustees for review.
- 2.2. Provide members with friendly and accurate service.
- 2.3. Maintain up-to-date demographics of members with appropriate membership categories including awards and certification.
- 2.4. Prepare and distribute membership renewal statements in a timely fashion with appropriate follow-up.
- 2.5. Prepare and mail membership applications with cover letter to potential members.
- 2.6. Prepare and mail cover letter with new member packet to new members.
- 2.7. Develop an annual membership directory to include the Officers, awards, Bylaws, Constitution, committees, and other pertinent information.
- 2.8. Distribute membership directory to all appropriate parties each year.

3. College Documents

- 3.1. Prepare, publish and maintain the documents of the AOCOPM (e.g. Constitution, Bylaws, Fellow and Faculty criteria, long-range planning documents, etc.) in appropriate form for easy retrieval and distribution.
- 3.2. Maintain a library of historic documents of the AOCOPM (and AOCOPM) for reference.
- 3.3. Assist in the review and updating of documents; safeguarding appropriate amendment processes.



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4. Fiduciary Management

- 4.1. Collect and record fees for membership, seminars, meetings, educational programs, or other functions sponsored by the AOCOPM.
- 4.2. Acknowledge payment of fees to members and meeting participants, educational participants and participants in other functions conducted under the auspices of the AOCOPM.
- 4.3. Prepare financial statements in conjunction with the Treasurer on a schedule and in a format requested by the Treasurer, Board and/or Finance Committee.
- 4.4. Maintain financial records in accordance with acceptable accounting procedures.
- 4.5. Prepare appropriate reports for all business meetings.
- 4.6. Practice due diligence in accurately applying revenues and expenses.
- 4.7. Maintain accounts receivable and accounts payable.
- 4.8. Write checks and make deposits.
- 4.9. In conjunction with the Treasurer, conduct a search for an accounting firm which specializes in non-profit, professional membership organizational accounting at least every five years.
 - 4.9.1. Provide appropriate documents and reports to the selected accounting firm for the preparation of annual compilation of financial statements and IRS reports (990), etc.
 - 4.9.2. Support a review or audit when instructed to do so by the Board of Trustees.
- 4.10. In collaboration with the Treasurer and Finance Committee, manage the financial resources of the College using such strategies that minimize risk and maximized return.
 - 4.10.1. All monies shall be deposited in AOCOPM bank accounts with the Executive Director and Treasurer as signatory with full power and authority to independently make disbursements pursuant to guidelines formulated by the Board or the Treasurer under the direction of the Board. Any and all money in such bank accounts shall be the sole possession of the AOCOPM.
- 4.11. Maintain a surety bond for Executive Director and all employees if required by the Board of Trustees.

5. Business Meetings

- 5.1. Assist the President with the preparation of the agenda and supporting documents and reports.
- 5.2. Arrange for a meeting room and food and beverage.
- 5.3. Notify appropriate individuals of date, time, and place of meetings.
- 5.4. Arrange for block of hotel rooms for participants, if applicable.
- 5.5. Distribute minutes and other supporting documents and reports.

6. Convention and CME Meetings

- 6.1. Provide full-time management and support staff of any scheduled educational meetings by the AOCOPM, or meetings authorized by the AOCOPM. This may include distributing teaching/instructional materials to the participants and speakers.



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- 6.2. Formulate and implement a promotional/marketing plan for of all conferences of AOCOPM
- 6.3. Negotiate all contracts with hotels and suppliers.
- 6.4. Assist the Program Chair and planning committee with all aspects of the meeting planning, such as:
 - 6.4.1. Meeting room assignments, menus, audio-visual equipment, signs, entertainment, etc.;
 - 6.4.2. Preparation of preregistration brochures, exhibitor prospectus, and program;
 - 6.4.3. Assist in the development of marketing for contributions and exhibits.
 - 6.4.4. Assist Program Chair and committees with on-site management of meeting to include registration (i.e., sign-in, badges, tickets, program packet, certificate of attendance, etc.).
 - 6.4.5. Assist with the planning of social events.
 - 6.4.6. Assist with preparation and presentation of plaques, awards, and gifts.
 - 6.4.7. Review and pay all bills incurred by the meeting.
 - 6.4.8. Prepare appropriate records on attendance for CME for the AOA records.
 - 6.4.9. Prepare comparative financial reports for officers.
 - 6.4.10. Prepare appropriate acknowledgement (thank you) letters to contributors, exhibitors, speakers, etc.
- 6.5. Contributors/Exhibitors
 - 6.5.1. Executive Officer may engage in activities sanctioned by the Board designed to increase non-dues revenues.
 - 6.5.2. Assist with the development of corporate contributors to include maintaining an up-to-date data base, preparing and distributing solicitations and/or prospectus for potential contributors/exhibitors.
 - 6.5.3. Provide a list of contributors/exhibitors for the newsletter and the annual meeting program.
 - 6.5.4. Encourage and inspire members to recruit new corporate contributions/exhibitors.
 - 6.5.5. Design, prepare and distribute letters of appreciation to contributors/exhibitors.
7. Postdoctoral Training
 - 7.1. Maintain an up-to-date list of all interns, residents and fellows in specialties related to AOCOPM.
 - 7.2. Provide pertinent information on residency programs, certification exams, etc., upon request by interested persons.
 - 7.3. Support the AOCOPM Education Evaluation Committee in its efforts to maintain current Basic Standards and to ensure quality AOA-approved Postdoctoral training programs (Occupational Medicine, Public Health, Correctional Medicine, Undersea Hyperbaric Medicine, Aerospace Medicine, and other related disciplines).
 - 7.3.1. Assist interest parties in developing new training programs.



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- 7.4. Facilitate ABMS-Certified physicians in completing the process to being deemed AOA Board-Eligible
- 7.5. Encourage trainees in non-AOA certified programs to petition the AOA to have their program individually accepted by the AOA.

8. Committees

- 8.1. Executive Director will support all committees of the AOCOPM.
 - 8.1.1. Responsibilities include: notification, preparation and distribution of materials, reimbursement of expenses.
 - 8.1.2. Fellow and Faculty
 - 8.1.2.1. Make available applications for Fellowship and Faculty status to all new members.
 - 8.1.2.2. Assist the Fellows and Faculty Selection Committee as needed.
 - 8.1.2.3. Arrange the Convocation of Fellows at the Midyear Meeting of the AOCOPM.
 - 8.1.2.4. Order medallions, gowns, etc.
 - 8.1.2.5. Prepare an appropriate program for the Convocation.
 - 8.1.2.6. Maintain accurate information and records on Fellowship and Faculty criteria as excerpted from the Bylaws and Constitution, and provide information, as requested.
 - 8.1.3. Publications
 - 8.1.3.1. Assist in the preparation and distribution of the newsletter.
 - 8.1.3.2. Forward articles and submissions to the editor of the newsletter on a timely basis.
 - 8.1.3.3. Maintain an up-to-date newsletter distribution list, to include all categories of membership, the AOA Board of Trustees, AOA colleges and other specialty colleges.
 - 8.1.3.4. Solicit articles, advertising, and other promotional material as needed to further the goals of the AOCOPM.
 - 8.1.3.5. Ensure the AOCOPM web-presence is updated and adequate

9. Other Duties and Responsibilities

- 9.1. Develop and maintain a manual of policies and procedures for the AOCOPM.
- 9.2. Represent the AOCOPM and its Divisions at AOA and other specialty college meetings as directed by the Board of Trustees.
- 9.3. AOA Relations
 - 9.3.1. It is the responsibility of the Executive Officer to interact effectively with the AOA to further the goals and objectives of the AOCOPM.
 - 9.3.2. The Executive Director must facilitate conversations, strategic meetings, and program planning with the relevant committees and parties of the AOA.
 - 9.3.3. The Executive Director must report to the Board of Trustees AOA activities



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relevant to the AOCOPM.

- 9.4. Handle all inquiries and general correspondence, advising various Officers and Board of Trustees of pertinent information.
- 9.5. Forward all pertinent correspondence to the President, Committee Chairs and other Officers of the AOCOPM.
- 9.6. Assist the AOCOPM leadership with special projects as directed by the Board of Trustees.
- 9.7. Commit to life-long learning and continuous improvement as a professional osteopathic association executive.