

# BOARD POSITION DESCRIPTIONS



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### Resources:

Documents created by former board members

Sample Chapter Leader Position Descriptions: <http://www.ATD.org/Members/Chapters/Chapter-Leader-Community/Chapter-Administration/Resources-by-Leadership-Position>

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[Chapter Relations Manager](#)

[National Advisors for Chapters \(NAC\)](#)

[Chapter Operating Requirements \(CARE\)](#)

[Sharing Our Success \(SOS\)](#)

[Chapter Leader Community \(CLC\)](#)

[Leadership Connection Newsletter \(LCN\)](#)

[Toolkits](#)

[Chapter Leader Webcasts](#)

# BOARD POSITION DESCRIPTIONS



## President

### Position Summary:

The President has executive responsibility to provide the vision, structure, culture and environment to enable the Chapter to meet the mission and goals created as a team.

The mission of the office of the President is to ensure that the Chapter purpose is met through the effective functioning of the Chapter Board and its members and through a judicious use of Chapter resources.

### Responsibilities:

CARE – Responsible for meeting requirements and publishing report

### Operations

- Provide encouragement, support, resources, feedback to individual Board members especially President-Elect.
- Validate vision and mission and goal setting.
- Establish and maintain effective processes and communication to enable the board to serve members effectively.
- Assure all board and business operations function effectively, to understand member needs and deliver superior service and assure ATD Chapter Operation Requirements are met.
- Review the progress of goals, strategies, and projects at monthly Board meetings.
- Lead effective transition to a new board annually.
- Lead monthly Board and chapter meetings; participate in other chapter events/committee meetings as available.
- Lead board and chapter members in affiliating, collaborating and using regional and national resources, including Chapter member companies.
- Represent chapter professionally and ethically in all business functions/organizational activities.
- Works with VP Volunteers to co-host the December Awards program.
- Attend all monthly chapter meetings and the Annual Leadership Conference. (ALC)
- Recruits and trains incoming officer
- Write monthly articles for the newsletter

### Time Commitment:

**Term:** One year (after one year as president elect, serve one year as past president after term of president)

Three Years:

Year 1 – President elect

Year 2 – President

Year 3 – Immediate past president

Estimated Time Requirements per month:

- Attending board meetings: 2 hours plus travel time
- Attending monthly chapter meetings: 1.5 hours plus travel time
- Communicating with administrative office about routine issues: 2-4 hours
- Other: 10 hours per month

### Critical Success Factors

The primary functions of the President are to:

- Provide leadership to enable Board to succeed by meeting team established goals
- Adherence to CARE
- Provide expertise to enable overall health of the Chapter

### Board Participation

- Attends and participates in monthly board meetings, chapter meetings, ATD International Conference & Exposition, and ATD Chapter Leaders Conference (ALC)
- Participates in the development and implementation of short-term and long-term strategic planning for the chapter
- Represents the chapter professionally and ethically in all business functions/organizational activities
- Attends and participates in all board and chapter meetings. Participates in other chapter events, committee meetings, and regional conferences as available

# BOARD POSITION DESCRIPTIONS



## Qualifications and Desirable Traits:

- Organization
- Ability to motivate others to action
- Communication skills
- Leadership skills. Effective verbal communication, leadership, diplomacy, personal interaction, problem-solving and meeting management
- Ability to lead a committee, delegate tasks, and monitor progress
- Ability to build, motivate, and lead a team of volunteers
- Ability to plan, organize, and evaluate chapter activities
- Demonstrated experience in budget design and accountability desired
- Demonstrated ability to manage projects
- Time available to fully participate in chapter and board meetings and other chapter functions as required by this position, and represent the chapter regionally and nationally
- National member of ATD and a member in good standing with the local chapter

## Line of Communication:

The President supports all Board Members and interacts within the Board as a member of the team, making decisions by consensus. There may be times when the President will be required to make executive decisions.

## Supported By:

The positions that the President is supported by All Board Members

## Contact:

Position Email: [president@austinATD.org](mailto:president@austinATD.org)

# BOARD POSITION DESCRIPTIONS



## Past President

### Position Summary:

The past president serves in an advisory role to the president, president elect, and chapter as a whole, and provides guidance and expertise as a knowledgeable member of the board. He/She advises on past practices and operations in accordance with the chapter bylaws. Upon request, he/she assists officers in performing their duties.

The mission of the Immediate Past President is to provide advice and guidance to Chapter officers

### Responsibilities:

Chapter Operating Requirements (CARE)

- Accumulates chapter information throughout the year and reports CARE results by January 31 each year.

### Chapter Leadership

- Serves as acting president if both the president and president elect are unavailable
- Supports the president and president elect in achieving chapter goals
- Advises chapter officers on relevant issues
- Planning/Strategy
- Participates in the development and implementation of short-term and long-term strategic planning for the chapter
- Participates in succession planning, including recruiting new board members
- Ensures that successors for all positions are identified and properly trained in advance of assuming the position
- Chapter Excellence Awards
- Prepares submissions for Chapter Excellence Award nominations, if applicable
- Board Role
- Attends all monthly membership and board of directors meetings
- Attends the ATD International Conference and Exposition and ATD Chapter Leadership Conference (ALC) as a representative of the chapter

### Time Commitment:

Term: One year, following term as president

Three Years:

- Year 1 – President elect
- Year 2 – President
- Year 3 – Immediate past president

Estimated Time Requirements per month:

- Attending board meetings: 2 hours plus travel time
- Attending monthly chapter meetings: 1.5 hours plus travel time
- Communicating with administrative office about routine issues: 2-4 hours

### Qualifications and Desirable Traits:

- Ability to build, motivate, and lead a team of volunteers
- Ability to plan, organize, and evaluate chapter activities
- Effective verbal communication, diplomacy, personal interaction, and problem-solving
- Ability to lead committees, delegate tasks, and monitor progress
- National member of ATD and member in good standing of local chapter

### Contact:

Position Email: [past\\_president@austinATD.org](mailto:past_president@austinATD.org)

# BOARD POSITION DESCRIPTIONS



## President Elect

### Position Summary:

The president elect assists the chapter president in performance of chapter management duties, automatically succeeding to president. He/She participates in the recruitment of board members to lead the chapter in the succeeding year.

The mission of the office of President-Elect is to prepare for leadership of the Chapter and to coordinate the development of succession planning.

### Responsibilities:

- Oversees the yearly CARE reporting requirement and functions as the main point of contact for national ATD on all CARE-related communications

### Supports President

- Assumes duties of president when he/she is absent from board meetings or chapter meetings
- Assists the president with chapter organization and management, clarifying board/committee responsibilities and encouraging the best use of chapter resources
- Supports the president in overseeing sound financial status of chapter by monitoring monthly budget reports
- Works with the president to establish productive relationships with ATD affiliates and chapter member companies

### Succession Planning

- Leads succession planning to include recruiting new board members, managing the chapter's succession process, and chairing the nominating committee
- Succeeds to president upon expiration of president's term or upon resignation, incapacity, or death of president; assume duties of president when president is absent from board meetings or chapter meetings/functions

### Membership

- Monitors/reports results of needs assessments and satisfaction surveys and conveys member suggestions to board and membership. Uses results to support strategic planning and goal-setting for succeeding year

### Time Commitment:

Term: Three Years:

Year 1 – President elect

Year 2 – President

Year 3 – Immediate past president

### Estimated Time Requirements per month:

- Attending board meetings: 2 hours plus travel time
- Attending monthly chapter meetings: 2-3 hours plus travel time
- Communicating with administrative office about routine issues: 2-4 hours
- Assisting president, learning chapter operations, developing board for coming year: 10-15 hours

### Board Role

- Attends and participates in monthly board meetings, chapter meetings, ATD International Conference & Exposition, and ATD Chapter Leaders Conference (ALC)
- Participates in other chapter events, committee meetings and conferences as available. Participates in other chapter events, committee meetings, and regional conferences as available
- Represents chapter professionally and ethically in all business functions/organizational activities

### Qualifications and Desirable Traits:

- Effective verbal communication, leadership, diplomacy, personal interaction, problem-solving and meeting management
- Ability to lead a committee, delegate tasks, and monitor progress
- Ability to build, motivate, and lead a team of volunteers
- Ability to plan, organize, and evaluate chapter activities
- Demonstrated experience in budget design and accountability desired
- Demonstrated ability to manage projects

# BOARD POSITION DESCRIPTIONS



- Leads the chapter's vision, mission, and direction planning process at annual transition meeting, and is prepared to communicate and gain chapter member commitment

## Chapter Recognition

- Leads the chapter awards committee in identifying candidates for local and national recognition, assuring proper award nomination documentation is submitted.

- Time available to fully participate in chapter and board meetings, and represent the chapter regionally and nationally
- National member of ATD and a member in good standing with the local chapter

**Contact:**

Position Email: [president\\_elect@austinATD.org](mailto:president_elect@austinATD.org)

# BOARD POSITION DESCRIPTIONS



## VP for Communications and Social Media

### Position Summary:

The Vice President of Communications is an elected officer of the Chapter. This position oversees activities related to communication among the Chapter members at large, and communication with the community and other professional associations. Additionally, this position oversees activities related to the marketing of chapter initiatives. Manage all social media communications with potential and existing members by increasing member participation in these outlets to create high levels of satisfaction among users.

The mission of the Vice President for Communications is to support other Chapter activities by providing information about them to the membership through such vehicles as a regularly published Chapter newsletter.

### Responsibilities:

#### Critical Success Factors

- Responsible for the content of the website
- Support Chapter activities through the internal Chapter communications such as the newsletter, updates, email blasts, etc.
- Provide expertise and support other communication and publication efforts such as meeting announcements, Chapter brochures, etc
- Establishing the Business Community Outreach Program
- Promotes ATD Eastern PA activities to HR and training professionals in a wide range of industries
- Develop committees to meet these goals

#### Social Media

- Develops and implements a strategy to engage and motivate active online advocates
- Stays up to date on new tools and how other organizations are using them, so that the chapter uses these technologies effectively
- Moderates message boards and keeps spam and unwanted solicitations in check
- Serves as an advocate for the community internally. Provides management with grassroots feedback and ideas
- Envisions and shapes web tools and direction for the community

#### CARE

- Ensures a communication piece is sent to members at least once each quarter.
- Ensures that the chapter adheres to ATD identity guidelines.

### Time Commitment:

**Term:** Two years, re-elected in even years

**Estimated Time Requirements per month:**

- Attending board meetings: 2 hours plus travel time
- Attending monthly chapter meetings: 1.5 hours plus travel time
- Communicating with administrative office about routine issues: 2-4 hours
- Creating or overseeing newsletter publication: 5 hours
- Create and implement Social Media strategic plan: 2-4 hours

### Communications

- Develop goals for maintaining and improving internal Chapter communications
- Develop a project plan to create a Business Community Outreach Program.
- Manage Chapter publicity and media relations
- Market special projects (ex. TTT workshop, National Conference, etc.)
- Advise Board of market trends
- Oversee person or persons responsible for production of newsletter. Responsibilities include such tasks as solicitation of general-interest articles, letters from the President, articles promoting Chapter and National activities, reviews of previous meetings, membership updates, etc.
- Coordinate communication activities with related activities of Membership, Programs & Events, and other offices as needed
- Report on communications-related topics to Board
- Attend and participate in all monthly Board Meetings & annual leadership conference
- May be asked to write articles for the newsletter

# BOARD POSITION DESCRIPTIONS



## Board Participation

- The Vice President of Marketing & Communications supports the President and interacts within the Board as a member of the team, making decisions by consensus and working with the President on an as-needed basis.
- The positions that the Vice President of Marketing & Communications & marketing is supported by:
  - Newsletter editor – responsible for publishing and distributing Chapter newsletter; VP of Marketing & Communication may fulfill this role
  - VP of Public Relations – responsible for developing sponsorships for the chapter and various chapter events
- Represents the chapter professionally and ethically in all business functions/organizational activities
- Attends and participates in all board and chapter meetings. Participates in other chapter events, committee meetings, and regional conferences as available
- Recruit and train incoming officer.
- Serves as a subject-matter expert advising the chapter board on the use of social media in support of its' mission
- Supports and promotes CARE, and the strategic goals and action plans of the chapter

## Contact:

Position Email: [communications@austinATD.org](mailto:communications@austinATD.org)

## Qualifications and Desirable Traits:

- Commitment to the chapters' Mission, Vision, Strategy, and Goals
- Skilled in written and verbal communication, personal interaction and problem-solving
- Ability to plan, organize and execute activities as required by the position
- Ability to complete projects within established timeframes
- Ability to delegate tasks and monitor follow-through
- Has a willingness to advocate for the chapter
- National member of ATD and a member in good standing with the local chapter
- Has a high degree of familiarity with the internet, social networking tools, and online protocol
- Ability to solve community disputes and enforce rules
- Ability to teach, guide and encourage others about the best practices in social media, including patience with people new to Web 2.0 tools and culture
- In-depth familiarity with online community best practices, and experience interacting in a variety of online contexts.
- Comfortable with blogging and utilizing social networking technology (advance coding skills not required)
- Solid marketing and public relations skills
- Skilled in written and verbal communication, personal interaction and problem-solving
- Ability to seek others out as volunteers
- Time available to fully participate in chapter programs and board meetings
- Time to attend board meetings and other chapter functions as required by this position
- National member of ATD and a member in good standing with the local chapter



# BOARD POSITION DESCRIPTIONS



## Vice President of Finance

### Position Summary:

The vice president of finance manages the operational finances of the chapter and maintains chapter's healthy financial position. He/She coordinates the budget and operational issues with other board members, as well as administrative services. He/She assures that chapter operations are in compliance with ATD's Chapter Operating Requirements (CARE).

The mission of the Vice President for Finance is to conduct budget planning and assure control over the Chapter's finances.

### Responsibilities:

#### Budgeting

- Creates an annual operating budget and makes it accessible to members

#### Conducts Audits

- Audits income/expenses and cash-flow on a monthly basis to ensure chapter's sound financial status
- Reports the results of financial audits to the board in a timely manner

#### Compliance

- Ensures compliance with CARE
- Ensures chapter is in compliance with state and federal reporting requirements

#### Finance/Operations

- Oversees operations and finance for the chapter
- Reconciles chapter bank accounts on a regular basis
- Oversees the accuracy of record-keeping and reporting
- Issues payment for invoices in a timely manner
- Maintains chapter tax-exempt non-profit status
- Ensures that the chapter maintains adequate insurance coverage

#### Training

- Recruits and trains incoming vice president of operations and finance
- Recruits and trains volunteers to support audit functions

#### Monthly Tasks/Duties

- Pay Bills

### Time Commitment:

**Term:** Two years, re-elected in odd years

Estimated Time Requirements per month: (10-15 hours / month)

- Attending board meetings: 2 hours plus travel time
- Attending monthly chapter meetings: 2-3 hours plus travel time
- Communicating with administrative office about routine issues: 2-4 hours
- Conducting internal Audit with committee: 8 hours plus travel time (one-time annually)

Record keeping and financial book upkeep: 2 hours

### Board Participation

- Reports all income and expenses to the board on a monthly basis including a profit and loss of the chapter and the monthly events, and a statement of the chapter's current financial status.
- Reports on financial status of chapter each January at membership meeting and each month at board meetings
- Attends and participates in all monthly board meetings and chapter programs
- Participates in other chapter events, committee meetings, and conferences as available
- Represents chapter professionally and ethically in all business functions/organizational activities

Participates in the ATD International Conference and Exposition and ATD Chapter Leaders Conference (ALC)

### Qualifications and Desirable Traits:

- Working knowledge of computer-based financial record keeping and reporting programs or has a willingness to learn.
- Ability to perform financial budgeting bookkeeping and record keeping or have a willingness to learn

# BOARD POSITION DESCRIPTIONS



- Coordinate and maintain accurate and detailed records of revenue and expenses in Quickbooks in cooperation with the Chapter Administrator
- Coordinate necessary exchange of financial information with chapter administrator in order to maintain accurate records.

## Annual Tasks/Duties

- Publish an annual budget that indicates projected revenues, expenses, and the value of donated services
- Present annual financial reports to the board
- Publish annual financial reports in the newsletter
- Coordinate external audit review at least every two years
- Maintain and update chapter insurance
- Present ideas to improve the management of chapter finances
- Work with president in filing annual IRS tax filings

## Investments

- Research and make recommendations to the board on how to grow funds in interest-bearing accounts.
- Monitor investment of chapter funds

## Continuous improvement

- Oversee the short and long-term financial stability of the chapter
- Prepare special reports as requested by the board

- Knowledge of or be willing to learn QuickBooks
- Ability to work with details
- Demonstrated experience in budget design, fiscal responsibility and accounting practices
- Good understanding of operations and finance
- Ability to work with administrative services
- Time available to fully participate in chapter and board meetings, and represent the chapter regionally and nationally
- National member of ATD and a member in good standing with the local chapter
- Desire: Experience in maintaining financial records for a business or professional association

## Contact:

Position Email: [membership@austinATD.org](mailto:membership@austinATD.org)

# BOARD POSITION DESCRIPTIONS



## Vice President of Membership

### Position Summary:

The vice president of membership manages the overall membership function including the design and implementation of programs that broaden membership engagement for the chapter through promoting the value of local membership, increasing membership by an identified goal, support and retain current membership with exceptional customer service, and consistently meet or exceed National ATD CARE membership requirements.

The mission of the Vice President for Membership is to maintain a membership database, including current chapter and national members, members due for renewal, expired members, and non-members to sustain the Chapter as a viable organization in both the public and private sectors.

### Responsibilities:

#### Member Recruitment/Orientation

- Creates prospect and new member packets detailing top benefits of joining the organization, and upcoming opportunities to meet other prospects/members
- Ensures new member orientation occurs on a regular basis with board and committee members available to answer questions regarding the organization
- Coordinates distribution of membership packets, including current rosters and member benefits.

#### Member Retention

- Implements programs that result in decreased membership expirations
- Ensures processes are in place to follow up with members whose annual membership is about to expire, and advocates renewal
- Increases member renewal by a stated amount

#### Member Satisfaction

- Provides services that will enhance new members acculturation to the organization
- Conducts needs assessment and member satisfaction surveys on a regular basis, reports results and make recommendations to the board
- Coordinate, document, update, and manage the membership administrative processes
- Maintain a membership database including both current Chapter and national members, members due for renewal and non-members on the mailing list

### Time Commitment:

**Term:** Two years, re-elected in odd years

Estimated Time Requirements per month: (~20 hours / month)

- Attending monthly board meetings: 2 hours plus travel time
- Attending monthly chapter meetings: 1.5 hours plus travel time

Assisting with membership questions/issues and preparing documentation for submission for CARE: ~16 hours/month

### Board Participation

- Partners with other committees (marketing, programs) to highlight the value to becoming a member
- Attends and participates in all monthly board meetings and chapter programs.
- Tracks new, renewed, and expired memberships and reports to board on a regular basis
- Participates in other chapter events, committee meetings, and conferences as available
- Represents chapter professionally and ethically in all business functions/organizational activities

Support Board members and Committee chairs with membership information and database as required

### Qualifications and Desirable Traits:

- Solid marketing and public relations skills
- Skilled in written and verbal communication, personal interaction and problem-solving
- Strong customer service, marketing and public relations skills desired
- Ability to plan, organize and execute activities as required by the position
- Ability to complete projects within established timeframes
- Ability to delegate tasks and monitor follow-through

# BOARD POSITION DESCRIPTIONS



- Establish and execute a plan for recruiting new members for the Chapter
- Contact National members not more than once per year regarding joining the local chapter
- Track new members, renewed members, mailing list additions and expired memberships and report to the board monthly
- Coordinate issuance of a membership information email packet to new members and renewals, including a list of member benefits, scheduled events/locations
- Update membership info as needed
- Respond to requests for assistance with membership issues in a timely manner
- Collect, analyze, and report demographic data gathered from membership applications
- Conduct periodic new member orientation meetings prior to monthly chapter meetings. Assemble a gift packet with promotional materials, highlight volunteer opportunities and seat each new member with a current Board member at the meeting
- Provide general membership information and be available to members at monthly program meetings
- Call or have volunteers call new members to connect, promote upcoming events and networking opportunities, and ask about the new member's expectations
- Adept in verbal communication, diplomacy, personal interaction, and problem-solving
- Experience with Microsoft Office and Membership Databases
- Professional and follows through on commitment
- Demonstrates attention to detail
- Outgoing and helpful
- Ability to keep member database confidential
- Ability to seek others out as volunteers
- Has a willingness to advocate the chapter
- Time available to fully participate in chapter programs and board meetings
- National member of ATD and a member in good standing with the local chapter

**Contact:**

Position Email: [membership@austinATD.org](mailto:membership@austinATD.org)

**Training**

- Recruits and trains incoming vice president of membership
- Recruits and trains volunteers to support membership functions
- Constantly updates personal knowledge of ATD strategies and operations

# BOARD POSITION DESCRIPTIONS



## VP of Professional Development

### Position Summary:

The mission of the Vice President for Professional Development is to coordinate special events, conferences, or programs and maintain a clearinghouse of information to further the professional development of Chapter members

### Responsibilities:

#### Program Development

- Ensures a relevant special programs (such as workshops, etc) are held on a regular basis
- Solicits professional development program topics from membership and evaluates relevance and interest to members
- Administers program events within budget
- Attracts and secures speakers who address the concerns and interests of the membership
- Coordinates locations for meetings
- Collects and reports on participant feedback of programs, and uses feedback to plan future events
- Provides event details, including speaker's biography for chapter website and/or newsletter.
- Works closely with VP of Programs to complement monthly meeting programs.

#### Training

- Recruits and trains incoming vice president of professional development and makes recommendation to him/her regarding future speakers, topics, etc.
- Recruits and trains volunteers to support program functions.

### Contact:

Position Email: [professional\\_development@austinATD.org](mailto:professional_development@austinATD.org)

### Time Commitment:

**Term:** Two years, re-elected in even years

Estimated Time Requirements per month:

- Attending board meetings: 2 hours plus travel time
- Attending monthly chapter meetings: 2-3 hours plus travel time
- Communicating with administrative office about routine issues: 2-4 hours

### Board Participation

- Attends board meetings, chapter programs, and regular committee meetings.
- Represents the chapter professionally and ethically
- Attends and participates in all board and chapter meetings. Participates in other chapter events, committee meetings, and regional conferences as available

### Qualifications and Desirable Traits:

- Possesses marketing and public relation skills
- Skilled in written and verbal communication, personal interaction and problem-solving
- Ability to plan, organize and execute activities as required by the position
- Ability to complete projects within established timeframes
- Ability to delegate tasks and monitor follow-through
- Ability to attract and lead committee members
- Time to attend board meetings and other chapter functions as required by this position
- National member of ATD and a member in good standing with the local chapter

# BOARD POSITION DESCRIPTIONS



## VP of Programs

### Position Summary:

The mission of the Vice President for Programs is to enhance the professionalism of members by providing regularly scheduled programs of general interest and developmental opportunities for members.

The vice president of programs and events oversees the chapter's programming function, including responsibility for topic/speaker selection, site selection, and overall meeting management and reporting.

### Responsibilities:

#### Program Development

- Ensures a relevant program/event is held on a regular basis (at least one each quarter)
- Solicits program topics from membership and evaluates relevance and interest to members
- Administers program events within budget
- Attracts and secures speakers who address the concerns and interests of the membership
- Coordinates locations for meetings
- Collects and reports on participant feedback of programs, and uses feedback to plan future events
- Provides meeting details, including speaker's biography for chapter website and/or newsletter.

#### Lunch and Learn

- Find and schedule speakers for lunch and learn
- Point of contact for speakers
- Prepare L&L slide shows
- Find venue and maintain relationship with venue for L&L
- Create surveys/smile sheets
- Set up and break down of venue
- Ensure break even of costs and attendees
- Write up posting for website
- Arrange Speaker gift
- Negotiate speaker fees/travel expenses.

#### Training

- Recruits and trains incoming vice president of programs and volunteers for events and makes recommendation to him/her regarding future speakers, topics, etc

### Time Commitment:

**Term:** Two years, re-elected in even years

Estimated Time Requirements per month:

- Attending board meetings: 2 hours plus travel time
- Attending monthly chapter meetings: 2-3 hours plus travel time
- Communicating with newsletter editor, individuals responsible for website, administrative office and committee members about routine issues: 2-4 hours
- Planning and organizing Lunch and Learn speakers: 5-10 hours

### Board Participation

- Recruits and trains incoming officer
- Represents the chapter professionally and ethically in all business functions/organizational activities
- Attends and participates in all board and chapter meetings. Participates in other chapter events, committee meetings, and regional conferences as available

### Qualifications and Desirable Traits:

- Possesses marketing and public relation skills
- Skilled in written and verbal communication, personal interaction and problem-solving
- Ability to plan, organize and execute activities as required by the position
- Ability to complete projects within established timeframes
- Ability to delegate tasks and monitor follow-through
- Ability to attract and lead committee members
- Organizational skills
- Networking or ability to discover and source speakers
- Time to attend board meetings and other chapter functions as required by this position
- National member of ATD and a member in good standing with the local chapter

### Contact:

Position Email: [programs@austinATD.org](mailto:programs@austinATD.org)

# BOARD POSITION DESCRIPTIONS



## VP of Public Relations

### Position Summary:

The mission of the Vice President for Public Relations is to promote the Chapter and the image of the training and development profession in the community.

### Time Commitment:

**Term:** Two years, re-elected in odd years

Estimated Time Requirements per month:

- Attending board meetings: 2 hours plus travel time
- Attending monthly chapter meetings: 1.5 hours plus travel time
- Communicating with administrative office about routine issues: 1-2 hours
- Outreach: 4-5 hours

### Responsibilities:

#### Outreach

- Develop a project plan to create a Business Community Outreach Program.
- Manage Chapter publicity and media relations
- Advise Board of market trends
- Coordinate communication activities with related activities of Membership, Programs & Events, and other offices as needed
- Report on public relations-related topics to Board
- Attend and participate in all monthly Board Meetings
- May be asked to write articles for the newsletter

#### Training

- Recruits and trains incoming vice president of public relations
- Recruits and trains volunteers to support public relations functions
- Constantly updates personal knowledge of ATD strategies and operations

#### Board Participation

- Partners with other committees (membership, programs) to highlight the value ATD offers to the community
- Attends and participates in all monthly board meetings and chapter programs.
- Tracks public relations marketing trends from chapter communications
- Participates in other chapter events, committee meetings, and conferences as available
- Represents the chapter professionally and ethically in all business functions/organizational activities

- Attends and participates in all board and chapter meetings. Participates in other chapter events, committee meetings, and regional conferences as available

### Qualifications:

- Solid marketing and public relations skills
- Skilled in written and verbal communication, personal interaction and problem-solving
- Ability to plan, organize and execute activities as required by the position
- Ability to complete projects within established timeframes
- Ability to delegate tasks and monitor follow-through
- Time available to fully participate in chapter programs and board meetings
- Has a willingness to advocate the chapter
- Ability to identify community partners and seek out their support and contributions.
- Ability to seek others out as volunteers.
- Time to attend board meetings and other chapter functions as required by this position
- National member of ATD and a member in good standing with the local chapter

### Contact:

Position Email: [public\\_relations@austinATD.org](mailto:public_relations@austinATD.org)

# BOARD POSITION DESCRIPTIONS



## VP of Records

### Position Summary:

The VP of Records document all of the Chapter's activities, records, policies, and membership. He/She records meeting minutes, writes chapter correspondence, and ensures communication of chapter proceedings and records.

The mission of the Vice President for Records is to document all of the Chapter's activities, records, policies, and membership.

### Responsibilities:

#### Chapter Support

- Collaborates with chapter office support personnel including telephone, facilities, equipment, staff, and supplies
- Oversees the membership directory, ensuring that it is current and accurate
- Coordinates any requirements involving the chapter's bylaws and/or articles of incorporation, including notification of meetings
- Ensures the safekeeping of all legal documents
- Recruits and trains incoming secretary, providing the incoming officer with computer/paper versions of chapter files

#### Board Participation

- Ensures that accurate minutes are taken and maintained as legal record of the chapter's board meetings
- Distributes minutes and project status reports prior to each board meeting
- Provides electronic transmission of minutes to board members
- Creates and maintains board of directors contact information in timely manner and distributes to board
- In collaboration with the president, sets annual goals for managing chapter administration
- Represents the chapter professionally and ethically in all business functions/organizational activities
- Attends and participates in all board and chapter meetings. Participates in other chapter events, committee meetings, and regional conferences as available

### Time Commitment:

**Term:** Two years, re-elected in odd years

Estimated Time Requirements per month:

- Attending board meetings: 2 hours plus travel time
- Attending chapter meetings: 1.5 hours plus travel time
- Communicating with administrative office about routine issues: 2-4 hours

### Qualifications and Desirable Traits:

- Demonstrated skills in typing, word processing, record keeping, and administrative processes
- Possess an ability to pay close attention to detail
- Ability to build, motivate, and lead chapter volunteers where needed
- Skilled in verbal communication, diplomacy, personal interaction, and problem-solving
- Ability to plan, organize, and evaluate activities required by the position
- Ability to complete projects within established timeframes
- Time to attend board meetings and other chapter functions as required by this position
- National member of ATD and a member in good standing with the local chapter

### Contact:

Position Email: [records@austinATD.org](mailto:records@austinATD.org)



# BOARD POSITION DESCRIPTIONS



## Vice-President for Special Interest Groups (SIG)

### Position Summary:

The mission of the Vice-President for Special Interest Groups is to coordinate the initial formation and ongoing support of special interest groups within the Chapter and to serve as their advisor and liaison to the Board of Directors.

### Responsibilities:

- Serve as a resource, reference and facilitator to help each SIG accomplish its goals
- Ensure each SIG has a leader and recruit leaders if needed
- Get board approval for appointment of SIG leaders
- Assist with identifying locations to hold SIG meetings
- Assist with writing/editing/updating monthly meeting announcements for SIG pages on the website, including date, time, location, host, topic, presenters, bios
- Make SIG announcements at monthly Chapter meetings
- Identify the need / opportunity for new special interest groups and recruit new leaders. Provide applicable information to Marketing / PR & Technology to recruit new leaders or add new SIGS.
- Serve as or arrange “substitute” SIG facilitators if needed.
- Provide monthly SIG activities update to Board
- Recruits and trains incoming officer.

### Action Items by Month

- Attend monthly Board Meetings
- Attend each SIG at least once quarterly to maintain relationships
- End of term: transition applicable docs / forms to new leadership

### Board Participation

- Represents the chapter professionally and ethically in all business functions/organizational activities
- Attends and participates in all board and chapter meetings. Participates in other chapter events, committee meetings, and regional conferences as available

### Time Commitment:

Term: Two years, re-elected in even years

Estimated Time Requirements per month: 8-20 hours total:

- Attending board meetings: 2 hours plus travel time
- Attending monthly chapter meetings: 1.5 hours plus travel time
- Communicating with administrative office about routine issues: 2-4 hours
  - Communicating with SIG leaders
  - Manage and attend SIG functions

### Qualifications and Desirable Traits:

- Organization development skills helpful
- Planning and consulting skills helpful
- Leadership style characterized by listening, encouraging flexibility and collaboration
- Project Management skills helpful
- Coordination skills
- Problem solving skills
- Excellent writing skills/ability to write promotional copy
- Excellent organizational skills
- Word processing / spreadsheet skills
- Web posting / google docs / google email
- Time to attend board meetings and other chapter functions as required by this position
- National member of ATD and a member in good standing with the local chapter

### Contact:

Position Email: [SIG@austinATD.org](mailto:SIG@austinATD.org)

# BOARD POSITION DESCRIPTIONS



## VP of Information Technology

### Position Summary:

The Vice President of Information Technology is an elected officer of the Chapter who is responsible to identify, implement and maintain website content and features and other technologies that will support board goals and improve member services.

The mission of the Vice President for Technology is to ensure that the chapter website functions properly and to explore new ways to incorporate technology to the betterment of service to members.

### Responsibilities:

#### Critical Success Factors

- The primary functions of the Vice President of Technology is a fully functional website rated useful by membership.

#### Operations

- Support board and chapter functions by providing web pages, publishing interface, surveys, discussions, webinars, online-forms, e-commerce and other features as appropriate.
- Maintain Home page and update as needed
- Provide help in accessing and navigating website
- Act as point of contact and liaison with website host
- Design annual budget for Technology function; audit income/expenses monthly to ensure chapter's sound financial status.
- Research, develop and facilitate the sourcing of new ideas and concepts for using technological innovation to deliver enhanced services to members.
- Attend all monthly board meetings and the annual leadership conference
- May be asked to write articles for newsletter
- Recruits and trains incoming officer.

#### Board Participation

- Partners with other committees (marketing, programs) to highlight the value to becoming a member
- Tracks new, renewed, and expired memberships and reports to board on a regular basis
- Represents the chapter professionally and ethically in all business functions/organizational activities
- Attends and participates in all board and chapter meetings and chapter programs. Participates in other chapter events, committee meetings, and regional conferences as available.

### Time Commitment:

Term: Two years, re-elected in even years

#### Estimated Time Requirements per month:

- Attending board meetings: 2 hours plus travel time
- Attending monthly chapter meetings: 1.5 hours plus travel time
- Communicating with administrative office about routine issues: 2-4 hours
- Maintaining and updating website: 1-2 hours per week

### Qualifications and Desired Traits:

- Skills maintaining websites or ability to learn (Wild Apricot)
- Time to attend board meetings and other chapter functions as required by this position
- Solid information technology expertise and social media skills
- Skilled in written and verbal communication, personal interaction and problem-solving
- Ability to plan, organize and execute activities as required by the position
- Ability to complete projects within established timeframes
- Ability to delegate tasks and monitor follow-through
- Time available to fully participate in chapter programs and board meetings
- Has a willingness to advocate the chapter
- Ability to seek others out as volunteers
- National member of ATD and a member in good standing with the local chapter

### Line of Communication

The Vice President of Technology supports the President and interacts within the Board as a member of the team, making decisions by consensus and working with the President on an as-needed basis.

### Contact:

Position Email: [technology@austinATD.org](mailto:technology@austinATD.org)

# BOARD POSITION DESCRIPTIONS



## VP of Volunteers

### Position Summary:

The mission of the Vice President for Volunteers is to solicit volunteers for the chapter, raise member awareness of and participation in voluntary community activities both within the ATD chapter and in the broader community, especially those that leverage the skills and capabilities of training and development professionals. The VP of Volunteers oversees the chapter's volunteer recruiting efforts, manages the matching of volunteers to volunteer opportunities, and guides the chapter's succession planning efforts to ensure that all volunteer needs are met.

### Responsibilities:

- Maintain volunteer list
- Communicate with potential volunteers
- Help recruit for board positions
- Recruits and trains incoming officer.
- Organize and award Volunteer of year award

### Chapter Support

- Develop annual Volunteer goals
- Research other professional organizations for ideas on how they approach managing volunteers
- Maintain list of volunteers who have expressed an interest in volunteering but have not yet been contacted or matched with a volunteer need
- Maintain a list of both unmet and met Board member volunteer needs
- Create an "intake checklist" (i.e. a list of skills & interests, available time, etc.) for volunteers to complete
- Create a spreadsheet/database of volunteer and volunteer needs demographic data (e.g., name, contact details, volunteer interests, volunteer need & requirements, etc.)
- Develop end-to-end process from attracting volunteers through volunteers being matched with volunteer needs
- Establish system for tracking volunteer involvement
- Create or maintain a chapter leader succession plan and ensure the chapter is following the plan

### Board Participation

- Provide a report on volunteer activities at monthly Board meeting
- Maintain and update records relevant to position for benefit of successor
- Before end of Board term, recommend at least two potential candidates for the position

### Contact:

Position Email: [volunteer@austinATD.org](mailto:volunteer@austinATD.org)

### Time Commitment:

Term: Two years, re-elected in odd years

Estimated Time Requirements per month:

- Attending board meetings: 2 hours plus travel time
- Attending monthly chapter meetings: 1.5 hours plus travel time
- Managing all volunteer-related issues: 3-6 hours

- Train successor in duties for this position during transition period prior to successor's term of office
- Participate in Board special task force activities
- Support and promote chapter operating requirements (CARE), and the strategic goals and action plans of the chapter
- Represent the chapter professionally and ethically in all business functions/organizational activities
- Attend and participate in all board and chapter meetings
- Participate in other chapter events, committee meetings, and regional conferences as available

### Qualifications and Desirable Traits:

- Skilled in written and verbal communication, personal interaction, and problem-solving
- Ability to plan, organize, and execute activities as required by the position
- Ability to complete projects within established timeframes
- Ability to delegate tasks and monitor follow-through
- Strong analytical and networking skills
- Has a willingness to advocate for the chapter
- Ability to seek others out as volunteers
- National member of ATD and a member in good standing with the local chapter
- Ability to conduct positive interactions with volunteers
- Networking abilities to locate and recruit volunteers
- Time to attend board meetings and other chapter functions as required by this position
- National member of ATD and a member in good standing with the local chapter

# BOARD POSITION DESCRIPTIONS

