



Board and Program Manager Job Descriptions

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Board Positions

President

The President shall be an ATD Baton Rouge chapter and national ATD member in good standing. The chapter bylaws state, the President shall:

- Serve a term of one calendar year
- Manage the chapter in accordance with the chapter bylaws and the laws of the state of Louisiana
- Preside at membership meetings, including special meetings of the chapter
- Preside and set the agenda for meetings of the board of directors
- Ensure bylaws and job descriptions are understood and adhered to by the Board of Directors
- Fulfill responsibilities as outlined in job description
- Recruit a Financial Review Committee if deemed necessary
- Recruit and preside over the Risk Management Committee, Bylaws Committee, and Presidents Council
- Assist the President-Elect however necessary with orienting his or her successor to the role

Additional responsibilities of the President are:

- Upon taking office, announce chapter's annual plan and goals no later than January 31st.
- Get Board approval of annual budget no later than January 31st.
- Ensure the achievement of the chapter's objectives and the development of long-range plans by coordinating, monitoring, and coaching the performance of chapter officers
- Ensure chapter meets all CARE guidelines
- Submits CARE documentation, reporting on the President's term, by the deadline set by the National Society
- Ensures the Board of Directors meets at least quarterly
- Conducts a mid-term strategic planning meeting
- Annual risk management review, and bylaws/mission/vision review
- Supports the President-Elect in planning and conducting an end-of-term strategic planning meeting
- Work with the President-Elect to ensure a smooth transition of board rotation
- Submit President's Report at least quarterly to chapter publications and/or website
- Update Treasurer and provide documentation of any expenditures related to the office
- Authorize all expenditures in excess of approved budgets

- At membership meetings, preside over election of officers, approval of bylaws revisions, and any other motions requiring membership approvals according to the bylaws
- Transfer debit card to President-Elect and mailbox keys to President no later than December 31st.
- Ensure each board member understand and can reply to questions regarding the benefits of membership
- Perform whatever roles and responsibilities that are necessary to meet chapter goals

Resources:

- The President shall be in possession of one of the chapter debit cards
- The President shall be in possession of one of the chapter mailbox keys
- The President shall have check-signing and contract-signing authority
- The President shall have access to ATD membership data reports

ATD Resources:	
<u>Chapter Relations Manager (CRM)</u>	<u>Chapter Leader Community (CLC)</u>
<u>National Advisors for Chapters (NAC)</u>	<u>Leadership Connection Newsletter (LCN)</u>
<u>Chapter Affiliation Requirements (CARE)</u>	<u>Toolkits</u>
<u>Sharing Our Success (SOS)</u>	<u>Chapter Leader Webcasts</u>

President-Elect

The President-Elect shall be an ATD Baton Rouge chapter and national ATD member in good standing. The chapter bylaws state, the President –Elect shall:

- Serve a term of one calendar year as President-Elect, the following term of one calendar year as President, and the third year as Past President
- Act for the President in his or her absence
- Form and serve on the Nominating Committee
- Facilitate strategic planning in preparation for term as President
- Perform other duties as requested by the President and as outlined in the job description
- Assume the office of President in accordance with the chapter bylaws should the President be unable to fulfill his or her term
- Shall serve on a Financial Review Committee should that committee be called

Additional responsibilities of the President-Elect are:

- Attend the ATD National Leadership Conference upon appointment of office. (This may be waived if desired if President-Elect has attended at least one prior Leadership Conference or if budget does not have available funding for any officer to attend.)
- As budget permits and as chapter strategy indicates need, select officers of incoming board to attend the Leadership Conference and develop budget worksheet
- Initiate, coordinate and develop strategic plan for the upcoming year, including membership input and results of membership survey in the planning process
- Initiate, coordinate and serve on the nominations committee for the upcoming year
- Ensure annual plan includes goals, marketing plan, membership recruitment and retention, and succession planning
- Learn as much as possible about the workings of the chapter and the national society, particularly CARE requirements, chapter history, and the roles and responsibilities of each board position
- Assist board members as needed
- Update Treasurer and provide documentation of any expenditures related to the office
- With Treasurer, prepare budget for following year.
- Serve on President's Council
- Understand and reply to questions regarding the benefits of membership
- Perform whatever roles and responsibilities that are necessary to meet chapter goals.

Resources:

- The President-Elect shall be in possession of one of the chapter debit cards
- The President-Elect shall be in possession of one of the chapter mailbox keys

- The President-Elect shall have check-signing authority and shall have and contract-signing authority for events and expenditures that will take place in the President-Elect's term of office as President
- The President-Elect shall have access to ATD membership data reports

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Past-President

The Past-President shall be an ATD Baton Rouge chapter and national ATD member in good standing. The chapter bylaws state, the Past-President shall:

- Serve on the President's Council
- Assist the President-Elect however necessary with orienting his or her successor to the role

Additional responsibilities of the Immediate Past-President are:

- Serve for one calendar year
- Help President ensure that chapter officers fulfill requirements
- Submit CARE application by national deadline (reporting on prior year, or term of office as President)
- Provide an annual report to the membership no later than January 31st upon completion of term of office
- Create and submit a Membership Satisfaction Survey and collate results, providing results to President and President-Elect; provide summary to Board if requested by the President
- Coordinate and promote Employee Learning Week activities and publicity
- Update Treasurer and provide documentation on any expenditures related to the office
- Foster relationship with President and encourage President and members of the Board
- Understand and reply to questions regarding the benefits of membership
- Perform whatever roles and responsibilities that are necessary to meet chapter goals as requested by the President.

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Treasurer

The Treasurer shall be an ATD Baton Rouge chapter and national ATD member in good standing. The chapter bylaws state, the Treasurer shall:

- Serve a term of one calendar year
- With the President-Elect, prepare an annual budget for Board approval
- Report on the financial condition of the chapter at meetings of the Board of Directors and at other times as called upon by the President
- Coordinate the Financial Review, providing a Financial Review Committee or an independent auditor any and all records necessary to complete a review of chapter finances
- Should the President and President-Elect offices become vacant simultaneously, shall convene the Board of Directors to select a member of that body to assume the duties and responsibilities of the President until a special election by the membership can be held
- Fulfill responsibilities as outlined in the job description
- Assist the President-Elect however necessary with orienting his or her successor to the role

Additional responsibilities of the Treasurer are:

- Collect and act as custodian of all funds
- Keep accurate records of all income and expenditures
- Provide monthly financial status report to the Board
- Manage the coordination of signature cards, debit cards, etc. for all officers requiring and permitted such access
- Take control of chapter checkbook, keeping up-to-date with entries
- Take control of chapter financial records and maintain in orderly manner
- Reconcile monthly bank statement
- Receive dues and lunch fees at monthly meetings or delegate to a committee member
- Pay for any expenses incurred
- Ensure receipts, ink pens and petty cash are available at meetings
- Check mailbox at least once a week. Check mail at least twice a week for any six weeks prior to a Professional Development event, and process mail
- Advise board and, upon board approval, invest available chapter funds in interest bearing CDs
- Coordinate with other board members for monies collected and expenses for any special events such as seminars and conferences
- Verify head count at meetings against vendor invoices
- Provide financial statement to membership via VP Publications at least quarterly
- Solicit budget input from board members
- Prepare chapter's year-end financial statement
- Serve on risk management committee
- Understand and reply to questions regarding the benefits of membership
- Assist President-Elect however necessary to ensure transition of office

- Perform whatever roles and responsibilities that are necessary to meet chapter goals as requested by the President

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Secretary

The Secretary shall be an ATD Baton Rouge chapter and national ATD member in good standing. The chapter bylaws state the secretary shall:

- Serve a term of one calendar year
- Assist the President-Elect however necessary with orienting his or her successor to the role

Responsibilities of the Secretary are:

- Conduct, record, and disseminate all matters of decision made by the Board of Directors
- Maintain a source of information on the Board-only section of the chapter website relative to the chapter's functions that shall include the bylaws, job descriptions, audit reviews, and other historical and living documents
- Record minutes of meetings of the Board of Directors. Upon approval by the Board of Directors ensure, with VP of Technology, that minutes are posted in the members-only section of the website.
- Understand and reply to questions regarding the benefits of membership
- Maintain and update chapter leadership roster and organizational chart
- Assist President-Elect however necessary to ensure transition of office
- Update Treasurer and provide documentation of any expenditures related to the office
- Perform whatever roles and responsibilities that are necessary to meet chapter goals as requested by the President
- Assist the President-Elect however necessary with orienting his or her successor to the role

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Vice President of Programs

The Vice President of Programs shall be an ATD Baton Rouge chapter and national ATD member in good standing. The chapter bylaws state that the VP of Programs shall:

- Serve for one calendar year
- This position may or may not be combined with the position of Vice President of Professional Development
- Assist the President-Elect however necessary with orienting his or her successor to the role
- Provide oversight over the following chapter program managers:
 - Professional Development
 - Special Interest Group (SIG)

Responsibilities of the VP of Programs are:

- Plan membership meeting presentations for calendar year and, preferably, from July 1 to June 30 wherever possible. Speakers and topics should be planned and information collected from them and disseminated to Board at least three months in advance.
- Provide VP of Marketing/Communications, VP of Publications, and VP of Technology all relevant information necessary to publicize the monthly meetings.
- Collect from speaker: any special room set up requests, equipment needed, bio, program description which includes learning objectives and head shot photograph
- Ensure speaker arrives 15 minutes early and is prepared to speak 45 minutes, including Q & A.
- Provide speaker estimated attendance and audience description
- Request permission to post copy of presentation on website members-only section
- Identify relevant topics and appropriate/qualified speakers for monthly meetings, within budget.
- Maintain speaker's gifts.
- Introduce speaker before meeting, provide speaker equipment assistance, thank and present speaker with gift after meeting or delegate to a committee member.
- Monitor program time.
- Send a thank you note to the speaker.
- Provide Past President with any programmatic questions you would like included in the membership survey
- Understand and reply to questions regarding the benefits of membership
- Utilize membership survey results for future program planning
- Update Treasurer and provide documentation on any expenditures related to office

- Monitor website for accuracy of event descriptions, speaker photo and bios, and ensure annual calendar remains up-to-date.
- Perform whatever roles and responsibilities that are necessary to meet chapter goals as requested by the President.
- Assist the President-Elect however necessary with orienting his or her successor to the role

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Vice President of Membership

The Vice President of Membership shall be an ATD Baton Rouge chapter and national ATD member in good standing. The chapter bylaws state, the VP of Membership shall:

- Serve a term of one calendar year
- Assist the President-Elect however necessary with orienting his or her successor to the role
- Ensure successful achievement of chapter CARE membership goals

Responsibilities of VP of Membership and the Membership Committee are:

- Advise the Hospitality Program Manager in providing hospitality services for all chapter meetings and events
- Recruit and serve on the Membership Committee
- Provide new member on-boarding and benefits workshops or communications
- Be custodian of all records of membership, ensuring accuracy of listing, including collecting and reporting to national membership record updates and/or errors
- Send welcome letters to members as they join
- Send one renewal request letter to members whose memberships are nearing expiration date
- Understand and respond to requests about benefits of membership
- Forward new member activity reports to Treasurer so he/she can cross reference and determine that all fees are collected
- Report membership statistics at each Board of Directors meeting, paying special note to ration of joint local/national members
- Ensure current membership roster is available at membership meetings
- Encourage applications for membership processing via Customer Care or website; if membership application is submitted on paper, ensure collection of fee and processing through the national society and the Treasurer within 48 hours of receipt
- Ensure membership database is up to date
- Establish strategies for local and/or national member recruitment and retention. Strategies may include:
 - Awards programs
 - Providing name badges at meetings
 - Ensure guests are welcomed at meetings
 - New member orientations
 - Submitting names of new members or highlights of members to publications
- Update Treasurer and provide documentation of any expenditures related to the office
- Perform whatever roles and responsibilities necessary to meet chapter goals as requested by the President.

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Vice President of Technology

The Vice President of Technology shall be an ATD Baton Rouge chapter and national ATD member in good standing. The chapter bylaws state, the VP of Technology shall:

- Serve a term of one calendar year
- Assist the President-Elect however necessary with orienting his or her successor to the role

Responsibilities of VP of Technology are:

- Serve as webmaster
- Maintain the chapter website
- Act as liaison between board and web maintenance contractor or National Society, whichever web hosting vendor is used
- Update web every two weeks for items including, but not limited to, job bank, special programs, conferences, news, chapter calendar, minutes posting, e-zine, etc.
- Every two months utilize volunteers to run website checks to ensure all links are working and that website is set up in an orderly manner so members and guests can find the information they are looking for
- Know, understand and adhere to ATD logo guidelines
- Provide advertising links as approved by the board when payments are received by Treasurer
- Ensure members, and members only, have access to members-only area
- Ensure board members, and board members only, have access to Chapter Leaders Workspace
- Check local chapter e-mail mailbox
- Update Treasurer and provide documentation of any expenses related to the office
- Understand and respond to requests about benefits of membership
- Perform whatever roles and responsibilities that are necessary to meet chapter goals as requested by the President.

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Vice President of Marketing & Communications

The Vice President of Communications shall be an ATD Baton Rouge chapter and national ATD member in good standing. The chapter bylaws state, the VP of Marketing shall:

- Serve a term of one calendar year
- Assist the President-Elect however necessary with orienting his or her successor to the role
- Oversees the following Program Manager positions:
 - Social Media
 - Publications
 - Community Involvement

Responsibilities of VP of Communications are:

- Creates and distributes press releases announcing new board members, including photo of president, upcoming meetings, and events to media outlets within the greater Baton Rouge region.
- Prepares and executes the chapter marketing and communication plans
- Oversees the implementation of a social media strategy and ensures engagement on social media outlets
- Works with the VP of Membership to design and implement membership marketing materials
- Knows, understands, and implements ATD logo guidelines
- Updates Treasurer and provide documentation of any expenses related to the office
- Understands and responds to requests about benefits of membership
- Serves on the Professional Development Committee
- Works with Community Involvement Program Chair to identify, establish and maintain partnerships with organizations with other community entities, including organizations with similar goals as ATD (example: SHRM), community nonprofit organizations (example: ALA, LANO), colleges/universities, etc.
- Works with President, Treasurer and Board to identify and set rates for sponsorships and advertising
- Develops and implements plans to solicit sponsorships and advertising
- Works with Publications Program Manager to develop and deliver timely newsletters and other publications to members
- Works with Publications Program Manager and Past President to develop a chapter annual report template

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Vice President of Hospitality

The Vice President of Hospitality shall be an ATD Baton Rouge chapter and national ATD member in good standing. The chapter bylaws state, the VP of Hospitality shall:

- Serve a term of one calendar year
- Assist the President-Elect however necessary with orienting his or her successor to the role.

Responsibilities of VP of Hospitality are:

- Provide hospitality services for all chapter membership meetings as scheduled by VP of Programs. This includes:
 - Scheduling meeting place for each program for the year and re-confirming with the meeting host as the program date draws near
 - Schedule catering service and menu for each program within board-approved budget
 - Distribute RSVP list no later than two days before the meeting to President, Treasurer, VP of Programs, and VP of Membership
 - Use registration tool for RSVPs, RSVP receipt/thanks, and tracking capabilities
 - Distribute RSVP list no later than two days before the meeting to President, Treasurer, VP of Programs, and VP of Membership
 - Trouble-shoot any emergencies (may include room not set up, catering not arriving, not enough utensils, identifying any safety hazards in the room...)
 - Provide nametags for meeting attendees
- Serve on the Hospitality Committee. Committee duties may or may not include:
 - Greeting guests
 - Setting up meeting room as directed by VP of Programs based on speaker's request and logistic feasibility
 - Ensuring catering is provided correctly and on time
 - Assist at registration desk at meetings
- Schedule annual holiday networking social event and provide hospitality services for this event. This includes:
 - Recommending meeting place and pricing to the board for approval based on bid process
 - Determine menu within board-approved budget
 - If a speaker is desired by the board, communicate with VP of Programs room layouts, location, and provide VP of programs any information necessary for publicity no later than 3 months prior to the social

- Ensure any speaker, activities, or decorations are secular in nature
- Receive RSVP's
- Send RSVP receipt/thanks e-mail to each respondent. Include respondent must pay if no-show.
- Maintain RSVP list
- Distribute RSVP list no later than two days prior to the social to the President, Treasurer, VP of Programs and VP of Membership
- If desired, secure decorations and decorate
- Plan any activities desired as appropriate – may include gift exchanges, door prizes, music, or dancing
- Update Treasurer and provide documentation of any expenses related to the office
 - Verify accuracy of catering invoices before providing to Treasurer
 - Verify accuracy of restaurant invoices before providing to Treasurer
- Understand and respond to requests about benefits of membership
- Perform whatever roles and responsibilities that are necessary to meet chapter goals as requested by the President.

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Program Managers

Professional Development Program Manager

The Professional Development Program Manager shall be an ATD Baton Rouge chapter member in good standing. The Professional Development Program Manager shall:

- *Serve for one calendar year*
- Lead the Professional Development committee
- Reports to the VP of Programs
- Assist the VP of Programs by planning and executing professional development events for the chapter.

Responsibilities of the Professional Development Program Manager and the Professional Development Committee are:

- Arrange for special professional development opportunities for chapter members and guests
- Chair committee to arrange for facilities, equipment, food, registration, speaker booking, sponsorships, marketing, vendors (if applicable), book sales (if applicable), and any/all other logistical needs to conduct a successful professional development conference or workshop
- Identify relevant topics and appropriate/qualified speakers for special programs.
- Utilize membership survey results in future planning
- Negotiate contract with speaker or speaker agency in coordination with President, Treasurer, and other members of Board or President's Council as determined by President.
- Work with President, VP of Programs, and Board of Directors in scheduling the event
- Work with the Treasurer to plan and execute an event budget
- Work with Committee, VP of Programs, VP of Marketing/Communications and VP of Technology to develop and execute an event marketing strategy
- Collect from speaker: any special room set up requests, equipment needed, bio, program description which includes learning objectives and head shot photograph
- Understand and reply to questions regarding the benefits of membership
- Ensure speaker knows time frames, estimated attendance and audience description
- The primary goal of the event is to provide professional development opportunities for the membership. If a revenue goal has not specifically been commissioned by the Board of Directors, the Committee is by default commissioned to ensure the event supports itself by breaking even.
- Perform whatever roles and responsibilities that are necessary to meet chapter goals as requested by the President.
- It is acceptable to work with other professional organizations, approved by the Board, to co-sponsor relevant events.

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Publications Program Manager

The Publications Program Manager shall be an ATD Baton Rouge chapter member in good standing. The Publications Program Manager shall:

- *Serve a term of one calendar year*
- Lead the Publications committee
- Reports to the VP of Marketing & Communications
- Assists the VP of Marketing & Communications by planning, preparing, and distributing regularly scheduled chapter member publications.

Responsibilities of the Publications Program Manager are:

- Establish a calendar of newsletter deadlines and distribution dates
- Prepare newsletter and post newsletter to the website
- Develop and collect content for chapter blog
- Write and post chapter blog postings on an established schedule
- Curate Twitter chat content for publication in newsletter and/or blog
- Ensure newsletter is distributed to members
- Know, understand and implement ATD logo guidelines
- Solicit articles or special input for newsletter from members and Board of Directors
- Ensure articles required for publication (i.e. any motions requiring a vote, prior year annual report, and new year annual goals) are run within the time frames outlined by the bylaws and the National Society
- Identify articles or special input for newsletter, particularly from the National Society
- Update Treasurer and provide documentation of any expenditures related to the office

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Social Media Program Manager

The Social Media Program Manager shall be an ATD Baton Rouge chapter member in good standing. The Social Media Program Manager shall:

- *Serve a term of one calendar year*
- Leads the Social Media committee
- Reports to the VP of Marketing & Communications
- Assist the VP of Marketing & Communications by implementing a social media strategy and engaging ATDDBR followers on all utilized social media outlets.

Responsibilities of the Social Media Manager are:

- Develops and implements a social media strategy that leverages ATDDBR presence on Facebook, Twitter, and LinkedIn
- Serves on the Social Media committee. Engages social media power users throughout the chapter to post and interact on social media outlets
- Schedules and implements scheduled social media postings, including Twitter chats, LinkedIn discussions, and Facebook posts
- Posts information using the chapter's Twitter and Facebook accounts
- Creates social media communication standards
- Works with VP of Marketing and Communication to include social media strategy in chapter's marketing and communication plans.
- Understand and respond to requests about benefits of membership

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- ATDDBR Twitter Account
- ATDDBR LinkedIn Account
- ATDDBR Facebook Account

Special Interest Groups Program Manager

The Special Interest Groups (SIG) Program Manager shall be an ATD Baton Rouge chapter member in good standing. The SIG Program Manager shall:

- Serve a term of one calendar year
- Leads the SIG committee
- Reports to the VP of Programs
- Assist the VP of Programs by identifying and implementing specialized content programs for chapter members

Responsibilities of the SIG Program Manager are:

- Identifies opportunities for specialized content programs, called SIGs
- Leverages ATD Communities of Practices as a guide for creating and promoting SIGs
- Works with President, VP of Programs, and VP of Membership to engage chapter members as SIG leaders
- Works with SIG leaders to organize informal meetings for SIG participants
- Communicates scheduled SIG events to VP of Programs and VP of Technology

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Community Involvement Program Manager

The Community Involvement Program Manager shall be an ATD Baton Rouge chapter member in good standing. The Community Involvement Program Manager shall:

- *Serve a term of one calendar year*
- Leads the Community Involvement committee
- Reports to the VP of Marketing & Communications
- Assist the VP of Marketing & Communications in promoting ATD's role in workplace learning and performance by identifying and maintaining key community partners.

Responsibilities of the Community Involvement Program Manager are:

- Works with VP of Marketing & Communications to identify strategic community partners
- Develops and maintains relationships with community partners
- Recommends ways for ATDBR to develop and partner with community partners on an ongoing basis
- Works with Professional Development program manager, chapter board, and community partners to plan and execute a community event that promotes workplace learning and performance

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