

ATD NOLA Board of Directors Role Descriptions:

President: Performs Chapter management duties and has executive responsibility to provide the vision, structure, culture, and environment to enable the Chapter to meet the mission and goals created by the team.

Past President: Assists the Chapter President in performance of Chapter management duties. Serves in an advisory capacity to the President and the Chapter as a whole. He or She participates in the recruitment of Board members to lead the Chapter in the succeeding year. He or She provides guidance and expertise as a knowledgeable member of the Board. He or She advises on past practices and operations in accordance with the Chapter by-laws.

Vice President of Administration and Finance: Collects, records, and disseminates all matters of decision made by the Chapter and maintains a source of information relative to the Chapter's functions, which includes the Chapter code of ethics and bylaws and all matters pertaining thereto. This position also prepares an annual budget, collects, and is custodian of all funds, keeps records of income and expenditures, provides monthly financial status reports to the Board, renders to the membership an annual report on all financial transactions, and provides data for any audits requested by the certified public accountant.

Vice President of Communications: Submits Chapter meeting and event announcements to business/social media outlets and sends press releases regarding Chapter activities and awards to appropriate media outlets. This position also is responsible to identify, implement, and maintain website content, features, and other technologies that will support Board goals and improve member services.

Vice President of Programming: Arranges programs for Chapter meetings, negotiates contracts with speakers, provides for professional development opportunities, arranges for facilities and equipment at all Chapter functions, and communicates to the VP of Communications to ensure all Chapter meeting notices are sent.

Vice President of Membership: Designs and executes membership drives to recruit new ATD National and ATD NOLA Chapter members from the private and public sectors. He or She is responsible for on boarding all new members. He or She is the custodian of all membership records.

Board Member at Large (up to 3): These individuals will collaborate with the Board to support the ongoing initiatives of the Chapter.

I. President

A. Position Summary:

Performs Chapter management duties and has executive responsibility to provide the vision, structure, culture, and environment to enable the Chapter to meet the mission and goals created by the team.

B. Term Commitment:

Term: 4 years

- President – 2 years
- Immediate Past President – 2 years

C. Responsibilities:

- Functions as the main point of contact for ATD National on all CARE related communications
- Oversee all CARE requirements and ensure annual CARE submission is completed
- Provide encouragement, support, resources, and feedback to individual Board members
- Set goals to fulfill the mission of the Chapter
- Establish and maintain effective processes and communication to enable the Board to serve members effectively
- 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
- Co-Leads the Chapter's vision, mission, and direction planning process at the annual Board retreat and communicates to gain Chapter member commitment
- Plan and facilitate end of year Board retreat
- Write a State of the Chapter article each year

D. Board Role:

- Attends and participates in monthly Board meetings, Chapter meetings, and ATD Chapter Leaders Conference (ALC)
- Understands CARE requirements applicable to the Board position and actively pursues achievement of CARE requirements
- 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 development and implementation of short-term and long-term strategic planning for the Chapter

E. Qualifications:

- 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 represent the Chapter regionally and nationally
- Maintains Power Membership Status as a member of ATD National and ATD NOLA Chapter

F. ATD Resources:

[Chapter Relations Manager \(CRM\)](#) [National Advisors for Chapters \(NAC\)](#) [Chapter Affiliation Requirements \(CARE\)](#) [Sharing Our Success \(SOS\)](#) [Chapter Leader Community \(CLC\)](#) [Leadership Connection Newsletter \(LCN\)](#) [Toolkits](#) [Chapter Leader Webcasts](#)

II. Past President

A. Position Summary:

Assists the Chapter President in performance of Chapter management duties. Serves in an advisory capacity to the President and the Chapter as a whole. He or She participates in the recruitment of Board members to lead the Chapter in the succeeding year. He or She provides guidance and expertise as a knowledgeable member of the Board. He or She advises on past practices and operations in accordance with the Chapter by-laws.

B. Term Commitment:

Term: 2 years following term as President

C. Responsibilities:

- Serves as acting President if the President is unavailable
- Supports the President and Chapter in achieving Chapter goals
- Advises Chapter officers on relevant issues
- Participates in the development and implementation of short-term and long-term strategic planning for the Chapter
- Leads succession planning to include recruiting and nominating new Board members and managing the Chapter succession process
- Ensures that successors for all positions are identified and properly trained in advance of assuming the position
- Annually review and determine if changes are necessary to Board job descriptions
- Present Board job descriptions to the Board for approval
- Co-Leads the Chapter's vision, mission, and direction planning process at the annual Board retreat and communicates to gain Chapter member commitment

D. Board Role

- Attends and participates in monthly Board meetings, Chapter meetings, and ATD Chapter Leaders Conference (ALC)
- Understands CARE requirements applicable to the Board position and actively pursues achievement of CARE requirements
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III. Vice President of Administration and Finance

A. Position Summary:

Collects, records, and disseminates all matters of decision made by the Chapter and maintains a source of information relative to the Chapter's functions, which includes the Chapter code of ethics and bylaws and all matters pertaining thereto. This position also prepares an annual budget, collects and is custodian of all funds, keeps records of income and expenditures, provides monthly financial status reports to the Board, renders to the membership an annual report on all financial transactions, and provides data for any audits requested by the certified public accountant.

B. Term Commitment:

Term: Two Years

C. Responsibilities:

- Ensures that accurate minutes are taken and maintained as legal record of the Chapter's Board meetings
- In collaboration with the President, sets annual goals for managing Chapter administration
- Reports financial data to the Board on a regular basis
- Creates an annual operating budget and makes it accessible to members
- Audits income/expenses and cash-flow monthly to ensure Chapter's sound financial status
- Conducts official and non-official financial reviews according to by-laws
- Reports the results of financial audits to the Board in a timely manner
- Ensures Chapter is following state and federal reporting requirements, maintains Chapter tax-exempt non-profit status
- Prepares financial documents for CARE
- Reconciles Chapter bank accounts monthly
- Issues payment for invoices in a timely manner
- Ensures that the Chapter maintains adequate insurance coverage
- Ensures that financial reviews are posted annually according to the by-laws

D. Board Role

- Attends and participates in monthly Board meetings, Chapter meetings, and ATD Chapter Leaders Conference (ALC)
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- Participates in other Chapter events, committee meetings, and conferences as available
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IV. Vice President of Communications

A. Position Summary:

Submits Chapter meeting and event announcements to business/social media outlets and sends press releases regarding Chapter activities and awards to appropriate media outlets. This position also is responsible to identify, implement and maintain website content, features, and other technologies that will support Board goals and improve member services.

B. Term Commitment:

Term: Two year

C. Responsibilities:

- Manages and maintains the Chapter website and social media platforms
- Act as point of contact and liaison with website host
- Research, develop and facilitate the sourcing of new ideas and concepts for using technological innovation to deliver enhanced services to members
- Distributes, collects, and analyzes the data from post event surveys
- Ensures that the Chapter adheres to ATD branding guidelines
- 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
- Manage Chapter publicity and media relations
- Market special projects (ex. Workshops, ATD certificate programs)
- Advise Board of market trends
- Oversee person or persons responsible for production of newsletter; solicitation of general- interest articles, letters from the President, articles promoting ATD and Chapter activities, reviews of previous meetings, membership updates, etc.
- Coordinate communication activities with related activities of Membership, Programming & Events, and other offices as needed
- Report on communications-related topics to Board
- Tracks marketing trends from Chapter communications

D. Board Role

- Attends and participates in monthly Board meetings, Chapter meetings, and ATD Chapter Leaders Conference (ALC)
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V. Vice President of Programming

A. Position Summary:

Oversees the Chapter's programming function, including responsibility for topic/speaker selection, site selection, and overall meeting management and reporting.

B. Term Commitment:

Term: Two year

C. Responsibilities:

- 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
- Recommends programming fees to the Board annually per the by-laws

D. Board Role

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VI. Vice President of Membership

A. Position Summary:

Designs and executes membership drives to recruit new ATD National and ATD NOLA Chapter members from the private and public sectors. He or She is responsible for on boarding all new members. He or She is the custodian of all membership records.

B. Term Commitment:

Term: Two Year

C. Responsibilities

- 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:
 - New Member Packet
 - How to use Chapter site
 - How to register for events
 - How to get involved
 - How to refer others
- Create on boarding presentation to be housed on Chapter website
- Mention Power Membership at each meeting
- 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
- Provides services that will enhance new members and make new members feel welcome to the organization
- Conducts needs assessment and member satisfaction surveys on a regular basis, reports results and make recommendations to the Board
- Tracks new, renewed, and expired memberships and reports to Board on a regular basis
- Recommends dues and Chapter membership terms to the Board annually per the by-laws

D. Board Role

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