

# 1. Job Descriptions

## 1.1. President

- Reports to:** The Board of Directors and General Membership
- Term of Service:** 15 months; renewable upon re-election, in the absence of a President-Elect. Must be available for a one additional year commitment as Past President.
- Selection:** Elected by Chapter membership as President-Elect in previous term
- Eligibility:** Chapter member in good standing, served as President-Elect in previous term
- Role:** Provide leadership and direction to the Board and Membership

### 1.1.1. Requirements

**Membership**— Maintain joint membership in the National Society and the Lincoln Chapter

**BOD Meetings**—Presides at, and sets the agenda for, all meetings of the Board of Directors which meets monthly in November (incoming), December (incoming), and January-December for the year of term in office.

**Membership Meetings**—Presides at, and sets the agenda for, all monthly programs and special events whenever possible.

**Succession Plan**—Maintain and update records relevant to position for benefit of successor as well as train successor in duties for the position during transition period prior to successor’s term of office.

**Leadership Development**—Attend the ASTD Leaders Conference in the year prior to term in Office.

**Ethics**—Uphold the Lincoln Chapter By-Laws, Articles of Incorporation, Code of Ethics, and Chapter Operating Policies.

### 1.1.2. Duties

**CEO**—Serve as the chief executive officer of the chapter and is responsible for managing the chapter in accordance with the By-Laws, Articles of Incorporation, Chapter Operating Policies, and the laws of the state of Nebraska. Ensure the chapter meets the ASTD brand identity guidelines.

**Annual Operation Plan**— Oversee the creation of an operational plan that includes but is not limited to: annual goals; communication/marketing strategy; recruitment/retention strategy; and succession planning strategy.

**Annual Budget**—Oversee the development and stewardship of the annual operating budget and make available to membership.

Co-sign contracts with the Vice President of Finance as approved by the Board.

Sign checks for payment of invoices in the absence of the Vice President of Finance.

Responsible for ASTD credit card (along with Pres-Elect and VP of Finance).

**Annual Report**— Produce and shares with members, an annual report that includes but is not limited to: membership numbers; financial performance; and progress toward annual goals.

**Leadership Development & Succession**— Provide leadership development opportunities for board members. Work to ensure sound leadership succession on the Board by appointing board replacements

from among chapter members in good standing with consensus of the Board.

**Committees**—Appoint chairs for committees as required.

**Manage**—Assign duties and responsibilities to such officers, members or committees of the same in order to accomplish the affairs of the corporation.

**Financial**—Review monthly Chapter financial statements.

**CORE**—Complete reporting requirements for CORE submission to the National society, in conjunction with President-Elect.

**Risk Management Committee**—Presides at, and sets the agenda for, all meetings of the Risk Management Committee.

**Web site**—Check relevant content on Chapter web site ([astdlincoln.org](http://astdlincoln.org)) and submit updates to Director of Web site, as needed.

**Newsletter**—Submit articles and President's Letter to the monthly newsletter.

**Other duties**—Other duties as required.

## ***1.2. President-Elect***

**Reports to:** President

**Term of Service:** 15 months. Must be available for a three (3) year commitment as President-Elect, President and Past President, serving a 15 months term in each position.

**Selection:** Elected by Chapter membership

**Eligibility:** Chapter member in good standing; must have served a minimum of one year as a Chapter officer

**Role:** Provide leadership and direction to the Chapter. Prepare for the Presidency by participating in board meetings, familiarizing oneself with the operating structure of the Chapter and assisting the President.

### **1.2.1. Requirements**

**Membership**— Maintain joint membership in the National Society and the Lincoln Chapter

**BOD Meetings**—Participate as a member of the Board of Directors which meets monthly in November (incoming), December (incoming), and January-December for the year of term in office. Preside over meeting if President is not available.

**Membership Meetings**—Participate as a member in monthly programs and special events whenever possible. Preside over meeting if President is not available.

**Succession Plan**—Maintain and update records relevant to position for benefit of successor as well as train successor in duties for the position during transition period prior to successor's term of office. Before end of Board term, recommend at least two potential candidates for the position.

**Leadership Development**—Attend the ASTD Leaders Conference in the year prior to term in Office.

**Ethics**—Uphold the Lincoln Chapter By-Laws, Articles of Incorporation, Code of Ethics, and Chapter Operating Policies

### **1.2.2. Duties**

**CORE**—Complete reporting requirements for CORE submission to the National society, in conjunction with President. Coordinate the chapter's compliance with CORE to the National society and assist other committees and officers to reach CORE compliance.

**Web site**—Check relevant content on Chapter web site ([astdlincoln.org](http://astdlincoln.org)) and submit updates to Director of Web site, as needed.

**Financial**—Submit annual budget for program area (TTT in September) and review monthly Chapter financial statements.

**Committees**—Participate as a member on the following committees:

1. Scholarship Committee
2. Chair of the Nominating Committee, as stated in the By-Laws, Article IV
3. Financial Review Committee, as stated in the By-Laws, Article V, Section D
4. Risk Management Committee
5. Big Event Committee, Recruit the chair(s) and members for the Big Event Committee and act as liaison between the Committee and the Board of Directors.

**Leadership Development & Succession**— Organize December Board Retreat to transition from existing

to incoming Board members. Work to ensure sound leadership succession on the Board by working in conjunction with the President in appointing board replacements from among chapter members in good standing with consensus of the Board.

**Monthly Report**—Prepare a monthly report for board meetings. This shows current activity and deadlines. Keep Board informed on status on CORE throughout the year.

**Assist President**—Assist the President as needed, and may perform duties in his/her absence. Assume the position of the President, upon consensus of the Board, should the office become vacant. (see [Bylaws Article III, Section I, Paragraph 2](#))

**Other duties**—Other duties as required.

### ***1.3. Past President***

- Reports to:** President
- Term of Service:** 15 months; renewable upon re-appointment with consensuses of the current Board of Directors in the absence of a current President.
- Selection:** Automatic following term as President
- Eligibility:** Chapter member in good standing; must have served as President in the previous term
- Role:** Provide leadership, advice, and act as a historical reference to the President, President-Elect, the Board and the Chapter

#### **1.3.1. Requirements**

**Membership**— Maintain joint membership in the National Society and the Lincoln Chapter

**BOD Meetings**—Participate as a member of the Board of Directors which meets monthly in November (incoming), December (incoming), and January-December for the year of term in office. Preside over meeting if President and President-Elect is not available.

**Membership Meetings**—Participate as a member in monthly programs and special events whenever possible. Preside over meeting if President and President-Elect is not available.

**Succession Plan**—Maintain and update records relevant to position for benefit of successor as well as train successor in duties for the position during transition period prior to successor's term of office.

**Leadership Development**—Attend the ASTD Leaders Conference in the year prior to term in Office when funds are available. Advise leadership members on various issues and topics.

**Ethics**—Uphold the Lincoln Chapter By-Laws, Articles of Incorporation, Code of Ethics, and Chapter Operating Policies

#### **1.3.2. Duties**

**Web site**—Check relevant content on Chapter web site ([astdlincoln.org](http://astdlincoln.org)) and submit updates to Director of Web site, as needed.

**Financial**—Review monthly Chapter financial statements.

**Committees**—Participate as a member of the following committees:

1. Scholarship Committee
2. Nominating Committee, as stated in the By-Laws, Article IV, Section A
3. Financial Review Committee, as stated in the By-Laws, Article V, Section D
4. Risk Management Committee
5. Chair the Past Presidents' Advisory Committee which meets quarterly.

**Leadership Development & Succession**— Support the President and President-Elect toward their respective goals. Assume the position of the President, upon consensus of the Board, should the office become vacant. (see [Bylaws Article III, Section I, Paragraph 2](#))

**Monthly Report**—Prepare a monthly report for board meetings.

**Other duties**—Other duties as required.

## ***1.4. Vice President of Communications/Secretary***

<b>Reports to:</b>	President
<b>Term of Service:</b>	15 months; renewable upon re-election (maximum of three (3) consecutive years)
<b>Selection:</b>	Elected by Chapter membership
<b>Eligibility:</b>	Chapter member in good standing; must have served as a Chapter Board member in the previous term
<b>Role:</b>	Oversee all communication goals, strategies, tools, and mechanisms including, but not limited to, print and electronic marketing correspondence and the chapter web site. Ensure all chapter communications adheres to ASTD's identity guidelines.

### **1.4.1. Requirements**

**Membership**— Maintain joint membership in the National Society and the Lincoln Chapter.

**BOD Meetings**—Participate as a member of the Board of Directors which meets monthly in November (incoming), December (incoming), and January-December for the year of term in office.

**Membership Meetings**—Participate as a member in monthly programs and special events whenever possible.

**Succession Plan**—Maintain and update records relevant to position for benefit of successor as well as train successor in duties for the position during transition period prior to successor's term of office. Before end of Board term, recommend at least two potential candidates for the position.

**Leadership Development**—Attend the ASTD Leaders Conference in the year prior to term in Office when funds are available.

**Ethics**—Uphold the Lincoln Chapter By-Laws, Articles of Incorporation, Code of Ethics, and Chapter Operating Policies

### **1.4.2. Duties**

**Financial**— Submit annual budget for program area and review monthly Chapter financial statements.

**Web site**—Check relevant content on Chapter web site ([astdlincoln.org](http://astdlincoln.org)) and submit updates to Director of Web site, as needed.

**Annual budget**—Assist the VP in developing an annual budget for newsletter.

**Committees**—Participate as a member on the following committees:

1. Risk Management Committee
2. Chair the Communications Committee—Assemble and oversee the Communications Committee and convene regular meetings.
  - a. Oversee Directors of Marketing, Newsletter, and Web site.
  - b. Ensure all committee members are in good standing.
  - c. Verify reimbursement requests from committee members and authorizes payment.

**Secretary**—Take minutes of all Board of Directors Meetings and the annual business meeting in January.

1. Take accurate notes of board discussions, announcements, and decisions.
2. Indicate needed follow-up actions, who is to do them, and by when.
3. Record whom is in attendance at Board meetings, record if a quorum is in attendance at Business meeting.
4. Collect relevant handouts of reports and proposals for yearly Chapter record of events.

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5. After the meeting, and not later than one week prior to the next meeting, type and copy minutes.
6. Send minutes to all board members no later than one week prior to the next board meeting.
7. Post the approved Board meeting minutes on the web site or send approved business meeting minutes to administrative assistant for minute book.
8. If unable to attend the meeting, contact a board member to ask assistance in taking minutes. Make arrangements to obtain the notes. Carry out steps 5-7.

**Monthly Report**— prepares a monthly report on the activities of the committee at the board meetings.

**Other duties**— Shall have such other duties and responsibilities from time to time as assigned to him/her by the President.

## ***1.5. Director of Marketing***

**Reports to:** VP of Communication

**Term of Service:** 15 months; renewable upon re-appointment (maximum of three (3) consecutive years)

**Selection:** Appointed by President and VP of Communication

**Eligibility:** Chapter member in good standing

**Role:** Communicate Chapter activities to members and the community at large through announcements, events, press releases, etc. Promote recognition of and respect for the chapter and its membership within the Lincoln and Nebraska business communities.

### **1.5.1. Requirements**

**Membership**— Maintain joint membership in the National Society and the Lincoln Chapter.

**BOD Meetings**—Participate as a member of the Board of Directors which meets monthly in November (incoming), December (incoming), and January-December for the year of term in office.

**Membership Meetings**—Participate as a member in monthly programs and special events whenever possible.

**Committee Meetings**—Actively participate as a member in monthly committee meetings and special activities. Must be a member of the Big event committee.

**Succession Plan**—Maintain and update records relevant to position for benefit of successor as well as train successor in duties for the position during transition period prior to successor's term of office. Before end of Board term, recommend at least two potential candidates for the position.

**Ethics**—Uphold the Lincoln Chapter By-Laws, Articles of Incorporation, Code of Ethics, and Chapter Operating Policies.

### **1.5.2. Duties**

**Financial**—Review monthly Chapter financial statements.

**Web site**—Check relevant content on Chapter web site ([astdlincoln.org](http://astdlincoln.org)) and submit updates to Director of Web site, as needed.

**Annual budget**—Assist the VP in developing an annual budget for program area.

#### **Public Relations**

1. Create press releases for various print, radio & TV media (where applicable) for Chapter events, accomplishments, etc.
2. Regularly ask "What have we done lately that we can promote?"
3. Work with Administrative Assistant and list of media contacts.

#### **Target Marketing**

1. Collaborate with Membership on new target markets to solicit for membership.
2. Develop marketing questions for membership survey and research for product and service development.
3. Investigate partnering opportunities with other organizations. Attend community events, Chamber functions and meetings of other professional organizations as a Chapter representative; request permission to distribute Chapter brochures at each. May assign a committee member as representative.

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### **Committee Marketing**

1. Act as a liaison on other committees to support their marketing needs.
2. Obtain monthly and annual marketing needs from other committees in January. Ad hoc committees should submit their proposed marketing needs ASAP (i.e. Big Event, SIGs, etc.)
3. Set a calendar for the year for due dates.
4. Committees should provide initial content written in a style that's as "marketing-oriented" as they can.

### **Sponsorship Marketing**

1. Obtain monthly and annual sponsorship needs from other committees in January. Ad hoc committees should submit their proposed needs ASAP (i.e. Big Event)
2. Set a calendar for the year for due dates and goals.
3. Market and maintain sponsorships. Ensure sponsors receive required services and recognition.

**Other duties**—Shall have such other duties and responsibilities from time to time as assigned to him/her by the VP or President.

## ***1.6. Director of Newsletter***

**Reports to:** VP of Communication

**Term of Service:** 15 months; renewable upon re-appointment (maximum of three (3) consecutive years)

**Selection:** Appointed by President and VP of Communication

**Eligibility:** Chapter member in good standing

**Role:** Publish the Chapter's monthly newsletter, ASTD-Link.

### **1.6.1. Requirements**

**Membership**— Maintain joint membership in the National Society and the Lincoln Chapter.

**BOD Meetings**—Participate as a member of the Board of Directors which meets monthly in November (incoming), December (incoming), and January-December for the year of term in office.

**Membership Meetings**—Participate as a member in monthly programs and special events whenever possible.

**Committee Meetings**—Actively participate as a member in monthly committee meetings and special activities.

**Succession Plan**—Maintain and update records relevant to position for benefit of successor as well as train successor in duties for the position during transition period prior to successor's term of office. Before end of Board term, recommend at least two potential candidates for the position.

**Ethics**—Uphold the Lincoln Chapter By-Laws, Articles of Incorporation, Code of Ethics, and Chapter Operating Policies.

### **1.6.2. Duties**

**Financial**—Review monthly Chapter financial statements.

**Web site**—Check relevant content on Chapter web site ([astdlincoln.org](http://astdlincoln.org)) and submit updates to Director of Web site, as needed.

**Annual budget**—Assist the VP in developing an annual budget for program area.

#### **Edit/Layout monthly newsletter**

1. Send notices to all Board Members by the 15th of each month reminding them to send information, articles, promotional pieces, etc. for the chapter newsletter by the 20th of each month.
2. Send reminder notices to all Board Members by the 19th of each month if all articles have not been received for the newsletter.
3. Compile all information to be included in the newsletter.
4. Design and lay out the monthly chapter newsletter.
5. Proof, edit, and lay out the newsletter, and saves it in .pdf format for placement onto the Web site. (Software for creating .pdf's can be provided by the chapter if the Director doesn't already have it.)
6. Post finalized newsletter .pdf file on the Web site and notify Administrative Assistant it has been posted so notice can be sent to membership.

**What's Happening**—Develop communication update (What's Happening) for monthly events and send to Administrative Assistant for distribution by the first day of the month. (May be assigned to a

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committee member.) Develop communication update for monthly events for three months in advance for printing and distribution at the monthly meeting by Monday prior to the meeting. (May be assigned to a committee member.)

**Other duties**—Shall have such other duties and responsibilities from time to time as assigned to him/her by the VP or President.

## ***1.7. Director of Technology***

<b>Reports to:</b>	VP of Communication
<b>Term of Service:</b>	15 months; Renewable upon re-appointment (maximum of three (3) consecutive years)
<b>Selection:</b>	Appointed by President and VP of Communication
<b>Eligibility:</b>	Chapter member in good standing
<b>Role:</b>	Communicate Chapter activities to members and the community at large through the website. Keep information on the website current by working with all the committees of the Leadership team.

### **1.7.1. Requirements**

**Membership**— Maintain joint membership in the National Society and the Lincoln Chapter.

**BOD Meetings**—Participate as a member of the Board of Directors which meets monthly in November (incoming), December (incoming), and January-December for the year of term in office.

**Membership Meetings**—Participate as a member in monthly programs and special events whenever possible.

**Committee Meetings**—Actively participate as a member in monthly committee meetings and special activities.

**Succession Plan**—Maintain and update records relevant to position for benefit of successor as well as train successor in duties for the position during transition period prior to successor’s term of office. Before end of Board term, recommend at least two potential candidates for the position.

**Ethics**—Uphold the Lincoln Chapter By-Laws, Articles of Incorporation, Code of Ethics, and Chapter Operating Policies.

### **1.7.2. Duties**

**Financial**—Review monthly Chapter financial statements.

**Annual budget**—Assist the VP in developing an annual budget for program area.

**Maintain the Chapter web site** (Specific tasks may be assigned to a committee member)

1. Maintain board minutes, financials and other board documentation on web site.
2. Add monthly programs, SIGs and other events to the calendar.
3. Coordinate with other committees for specialized web pages (i.e. Big Event information page, online annual survey, online monthly meeting survey, etc.).
4. Ensure all documentation, forms and links on the web site are accurate and current.
5. Review and troubleshoot any web access problems members may have.

**Other duties**—Shall have such other duties and responsibilities from time to time as assigned to him/her by the VP or President.

## ***1.8. Vice President of Membership***

<b>Reports to:</b>	President
<b>Term of Service:</b>	15 months; renewable upon re-election (maximum of three (3) consecutive years)
<b>Selection:</b>	Elected by Chapter membership
<b>Eligibility:</b>	Chapter member in good standing; must have served as a Chapter Board member in the previous term
<b>Role:</b>	Oversee membership goals, strategies, and activities that will assist the Chapter in recruiting new members and retaining current members. Provide membership services to the membership. Promote energy and enthusiasm for participation.

### **1.8.1. Requirements**

**Membership**— Maintain joint membership in the National Society and the Lincoln Chapter

**BOD Meetings**—Participate as a member of the Board of Directors which meets monthly in November (incoming), December (incoming), and January-December for the year of term in office.

**Membership Meetings**—Participate as a member in monthly programs and special events whenever possible.

**Succession Plan**—Maintain and update records relevant to position for benefit of successor as well as train successor in duties for the position during transition period prior to successor's term of office. Before end of Board term, recommend at least two potential candidates for the position.

**Leadership Development**—Attend the ASTD Leaders Conference in the year prior to term in Office when funds are available.

**Ethics**—Uphold the Lincoln Chapter By-Laws, Articles of Incorporation, Code of Ethics, and Chapter Operating Policies

### **1.8.2. Duties**

**Financial**—Review monthly Chapter financial statements.

**Web site**—Check relevant content on Chapter web site ([astdlincoln.org](http://astdlincoln.org)) and submit updates to Director of Web site, as needed.

**Annual budget**— Submit annual budget for program area with assistance from committee.

**Monthly Report**— Report on the activities of the committee at the board meetings.

**Committees**—Participate as a member of the following committees:

1. Risk Management Committee
2. Recognition and Awards Committee in an advisory position to assist with the development of the awards list, criteria, nomination and voting mechanism for annual recognition as well as supervise the recognition nomination, ballot development and voting. Monitor the award requirements/history and initiate nomination process for "Sally Schneider Award" every five (5) years (i.e. 2006, 2011, etc.).
3. Chair the Membership Committee which meets monthly.
  - a. Oversee Directors of Involvement, Connections & Recruiting.
  - b. Ensure all committee members are in good standing.
  - c. Verify reimbursement requests from committee members and authorize payment.

**Membership liaison**—Provide membership appeals at monthly programs or appoint someone to do so.

**Recognition and Awards**—Coordinate member services and recognition at monthly programs with the President and Programming Committee. Works in conjunction with the Director of Involvement and Programming Committee for the annual Membership Awards and Volunteer Recognition Program in December.

**Communications**—Work with all committee members to develop and/or maintain communication related to special events/opportunities; submit developed information to the Communication Committee for review, marketing, and distribution.

**Other duties**— Shall have such other duties and responsibilities from time to time as assigned to him/her by the President.

## ***1.9. Director of Involvement***

<b>Reports to:</b>	VP of Membership
<b>Term of Service:</b>	15 months; renewable upon re-appointment (maximum of three (3) consecutive years)
<b>Selection:</b>	Appointed by President and VP of Membership
<b>Eligibility:</b>	Chapter member in good standing
<b>Role:</b>	Facilitate new and veteran member volunteerism within the Chapter at various levels of involvement. Link volunteer resources to the needs of the various committees, SIGs, and Chapter events. Promote energy and enthusiasm for participation.

### **1.9.1. Requirements**

**Membership**— Maintain joint membership in the National Society and the Lincoln Chapter.

**BOD Meetings**—Participate as a member of the Board of Directors which meets monthly in November (incoming), December (incoming), and January-December for the year of term in office.

**Membership Meetings**—Participate as a member in monthly programs and special events whenever possible.

**Committee Meetings**—Actively participate as a member in monthly committee meetings and special activities.

**Succession Plan**—Maintain and update records relevant to position for benefit of successor as well as train successor in duties for the position during transition period prior to successor's term of office. Before end of Board term, recommend at least two potential candidates for the position.

**Ethics**—Uphold the Lincoln Chapter By-Laws, Articles of Incorporation, Code of Ethics, and Chapter Operating Policies.

### **1.9.2. Duties**

**Financial**—Review monthly Chapter financial statements.

**Web site**—Check relevant content on Chapter web site ([astdlincoln.org](http://astdlincoln.org)) and submit updates to Director of Web site, as needed.

**Annual budget**—Assist the VP in developing an annual budget for volunteer activities/recognition.

**Research**—Research and identify involvement opportunities for use by the Chapter Board.

**Promote volunteer opportunities** through the Directors of Newsletter and Web site for all monthly programs and projects requested by the Board and other committees.

**Recognition of Members**—Recognize volunteer activities and noteworthy actions and accomplishments of members through the Director of Newsletters and Web site.

**Recognition and Awards**—Assist with recognition at monthly programs of all volunteers by appropriately thanking them. Works in conjunction with the VP and Programming Committee for the annual Membership Awards and Volunteer Recognition Program in December.

**Committee**—Participate as the Chair of the Recognition and Awards committee, to be comprised of members in good standing, not in an elected position.

**Community liaison**—Serve as a liaison for community businesses and associations (e.g. Lincoln Chamber

of Commerce).

**Other duties**— Shall have such other duties and responsibilities from time to time as assigned to him/her by the VP or President.

## ***1.10. Director of Recruiting & New Member Services***

<b>Reports to:</b>	VP of Membership
<b>Term of Service:</b>	15 months; renewable upon re-appointment (maximum of three (3) consecutive years)
<b>Selection:</b>	Appointed by President and VP of Membership
<b>Eligibility:</b>	Chapter member in good standing
<b>Role:</b>	Actively recruit new members from the Lincoln and Nebraska communities. Implement follow-up with meeting guests and new members to ensure recruits' and new members' needs are met. Promote energy and enthusiasm for participation.

### **1.10.1. Requirements**

**Membership**— Maintain joint membership in the National Society and the Lincoln Chapter.

**BOD Meetings**—Participate as a member of the Board of Directors which meets monthly in November (incoming), December (incoming), and January-December for the year of term in office.

**Membership Meetings**—Participate as a member in monthly programs and special events whenever possible.

**Committee Meetings**—Actively participate as a member in monthly committee meetings and special activities.

**Succession Plan**—Maintain and update records relevant to position for benefit of successor as well as train successor in duties for the position during transition period prior to successor's term of office. Before end of Board term, recommend at least two potential candidates for the position.

**Ethics**—Uphold the Lincoln Chapter By-Laws, Articles of Incorporation, Code of Ethics, and Chapter Operating Policies.

### **1.10.2. Duties**

**Financial**—Review monthly Chapter financial statements.

**Web site**—Check relevant content on Chapter web site ([astdlincoln.org](http://astdlincoln.org)) and submit updates to Director of Web site, as needed.

**Annual budget**—Assist the VP in developing an annual budget for program area.

**Recruitment** —Develop effective methods to recruit new members. Maintain a supply of recruitment supplies (e.g. National/Local promotional literature, membership applications, etc.) at all monthly programs and special events. (May be assigned to a committee member.)

**Drives**—Coordinate and manage membership drives to promote recruiting and/or retention annually or biannually as directed. Coordinate with Director of Marketing on promotion needed to recruit new members, including but not limited to annual Membership Drive. (Specific tasks may be assigned to a committee member.)

**New Members**—Coordinate and manage New Member Orientation (NMO) in coordination with President and President-Elect. Coordinate the distribution of membership materials packet to new members with the Communications Committee.

**Communications**—Maintain communication materials including but not limited to: Initial Contact—Web site/Survey Script, Prospect (from events) Script, New Member Profile for newsletter, Meet a Member

Profile for newsletter, Final Opportunity/Recruitment/Retention Interview script.

**Promote Joint Membership**—Annually get a list of National Society members who are not local Chapter members. Contact them about the benefits of joining the local chapter (Letter to be signed by the President).

**Other duties**— Shall have such other duties and responsibilities from time to time as assigned to him/her by the VP or President.

## ***1.11. Director of Member Connections***

<b>Reports to:</b>	VP of Membership
<b>Term of Service:</b>	15 months; renewable upon re-appointment (maximum of three (3) consecutive years)
<b>Selection:</b>	Appointed by President and VP of Membership
<b>Eligibility:</b>	Chapter member in good standing
<b>Role:</b>	Actively recruit new members from the Lincoln and Nebraska communities. Implement follow-up with meeting guests and new members to ensure recruits' and new members' needs are met. Promote energy and enthusiasm for participation.

### **1.11.1. Requirements**

**Membership**— Maintain joint membership in the National Society and the Lincoln Chapter.

**BOD Meetings**—Participate as a member of the Board of Directors which meets monthly in November (incoming), December (incoming), and January-December for the year of term in office.

**Membership Meetings**—Participate as a member in monthly programs and special events whenever possible.

**Committee Meetings**—Actively participate as a member in monthly committee meetings and special activities.

**Succession Plan**—Maintain and update records relevant to position for benefit of successor as well as train successor in duties for the position during transition period prior to successor's term of office. Before end of Board term, recommend at least two potential candidates for the position.

**Ethics**—Uphold the Lincoln Chapter By-Laws, Articles of Incorporation, Code of Ethics, and Chapter Operating Policies.

### **1.11.2. Duties**

**Financial**—Review monthly Chapter financial statements.

**Web site**—Check relevant content on Chapter web site ([astdlincoln.org](http://astdlincoln.org)) and submit updates to Director of Web site, as needed.

**Annual budget**—Assist the VP in developing an annual budget for program area.

Contact guests and prospective members. Transfer contact management to Director of Recruiting for prospects who wish to attend an additional meeting.

**New Member Profile** —Welcome each new member; solicit New Member Profile information for the newsletter. (May be assigned to a committee member.)

**Partners Among Learners (PAL)**—Maintain a list of PAL volunteers and assign each new member a PAL. Trains new PALs on duties and responsibilities.

**Promote Leadership Opportunities**—Coordinate and manage an outreach event to help current membership become more aware of Chapter leadership and benefits. (Specific tasks may be assigned to a committee member.)

**Celebrate Membership Accomplishments**—Send acknowledgement of unique life events such as birth/adoptions, personal losses, and celebrations for promotions, certifications and personal accomplishments. (May be assigned to a committee member.)

**Exit Survey (Retention)**—Contact each person whose membership is expiring within 30 days. Using script as a guideline, conduct a retention interview and take advantage of promotion opportunities. (May be assigned to a committee member.) Report on findings to membership committee.

**Other duties**— Shall have such other duties and responsibilities from time to time as assigned to him/her by the VP or President.

## ***1.12. Vice President of Professional Development***

<b>Reports to:</b>	President
<b>Term of Service:</b>	15 months; renewable upon re-election (maximum of three (3) consecutive years)
<b>Selection:</b>	Elected by Chapter membership
<b>Eligibility:</b>	Chapter member in good standing; must have served as a Chapter Board member in the previous term
<b>Role:</b>	Provide professional development sessions for the membership and guest at meetings and special events.

### **1.12.1. Requirements**

**Membership**— Maintain joint membership in the National Society and the Lincoln Chapter

**BOD Meetings**—Participate as a member of the Board of Directors which meets monthly in November (incoming), December (incoming), and January-December for the year of term in office.

**Membership Meetings**—Participate as a member in monthly programs and special events whenever possible.

**Succession Plan**—Maintain and update records relevant to position for benefit of successor as well as train successor in duties for the position during transition period prior to successor's term of office. Before end of Board term, recommend at least two potential candidates for the position.

**Leadership Development**—Attend the ASTD Leaders Conference in the year prior to term in Office when funds are available.

**Ethics**—Uphold the Lincoln Chapter By-Laws, Articles of Incorporation, Code of Ethics, and Chapter Operating Policies

### **1.12.2. Duties**

**Financial**—Review monthly Chapter financial statements.

**Web site**—Check relevant content on Chapter web site ([astdlincoln.org](http://astdlincoln.org)) and submit updates to Director of Web site, as needed.

**Annual budget**—Assist the VP in developing an annual budget for programming.

**Monthly Report**— Report on the activities of the committee at the board meetings. Report to Board the attendance, revenue, and evaluation summaries following each program.

**Committees**—Participate as a member of the following committees:

1. Risk Management Committee
2. Chair the Programming Committee which meets monthly.
  - a. Oversee Director of Programming and Meeting Coordinators.
  - b. Ensure all committee members are in good standing.
  - c. Develop a rough outline of yearly calendar.
  - d. Coordinate with Director of Involvement to recruit committee members, and ensure all committee members are in good standing.
  - e. Verify reimbursement requests from committee members and authorize payment.

**Other duties**— Shall have such other duties and responsibilities from time to time as assigned to him/her by the President.

## ***1.13. Director of Programming***

<b>Reports to:</b>	VP of Programming
<b>Term of Service:</b>	15 months; must be available for a two (2) year commitment as the Director will assume the role of VP of Programming the following year
<b>Selection:</b>	Appointed by President and VP of Programming
<b>Eligibility:</b>	Chapter member in good standing
<b>Role:</b>	Provide professional development sessions for the membership and guests at meetings and special events.

### **1.13.1. Requirements**

**Membership**— Maintain joint membership in the National Society and the Lincoln Chapter.

**BOD Meetings**—Participate as a member of the Board of Directors which meets monthly in November (incoming), December (incoming), and January-December for the year of term in office.

**Membership Meetings**—Participate as a member in monthly programs and special events whenever possible.

**Committee Meetings**—Actively participate as a member in monthly committee meetings and special activities.

**Succession Plan**—Maintain and update records relevant to position for benefit of successor as well as train successor in duties for the position during transition period prior to successor's term of office. Before end of Board term, recommend at least two potential candidates for the position.

**Ethics**—Uphold the Lincoln Chapter By-Laws, Articles of Incorporation, Code of Ethics, and Chapter Operating Policies.

### **1.13.2. Duties**

**Financial**—Review monthly Chapter financial statements.

**Web site**—Check relevant content on Chapter web site ([astdlincoln.org](http://astdlincoln.org)) and submit updates to Director of Web site, as needed.

**Annual budget**—Assist the VP in developing an annual budget for newsletter.

**Assist**—Assist the VP in all program details.

**Meeting Icebreakers and Networking**—Coordinate with VP of Programming for appropriate icebreakers or networking activities at meetings.

**Chapter Hotline** —Update the Chapter Hotline after each meeting.

**Joint Meeting** —Coordinate the annual joint meeting with related local organizations (i.e. LHRMA)

Maintain and update the Programming Grid monthly.

**Other duties**— Shall have such other duties and responsibilities from time to time as assigned to him/her by the VP or President.

#### **Assist Meeting Coordinators**

Duties of Meeting Coordinators:

## **JOB DESCRIPTIONS**

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### **Prior to the meeting**

- Arrange for speaker.
- Check with speaker on AV needs and make arrangements to secure AV equipment. (President or President-Elect will have the laptop and projector.)
- Select location and meal or refreshment menu.
- Send program descriptions, speaker bio information, and speaker's photo to VP of Communications by the 20th of the month preceding the program for inclusion in the Newsletter and Web site. Must include how this topic is related to the CPLP competencies.
- Coordinate with Director of Involvement all details necessary for the meeting including door prizes, volunteers, and table top information.
- Copy speaker handouts if necessary. (administrative assistant can help with this)

### **During the meeting**

- Greet presenter and ensure needs are met.
- Introduce speaker
- Present speaker with thank you gift or arrange payment to presenter (if necessary). It is not the policy to pay for speakers, but may on occasion.

### **After the meeting**

- Verify monthly bill from meeting site location and authorizes payment.
- Coordinate with Administrative Assistant on the distribution of online program evaluations.
- Summarize the evaluations and submit them to the Vice President.
- Send the speaker a summary of the original evaluations and a thank you letter.
- Submit a short article summarizing the meeting content to the Director of Newsletter. This article should be submitted by the 20th of the month following the meeting

## ***1.14. Vice President of Finance***

<b>Reports to:</b>	President
<b>Term of Service:</b>	15 months; renewable upon re-election (maximum of three (3) consecutive years)
<b>Selection:</b>	Elected by Chapter membership
<b>Eligibility:</b>	Chapter member in good standing; must have served as a Chapter Board member in the previous term
<b>Role:</b>	Maintain accurate financial records and ensure the Chapter's sound financial status. Advise the leadership on fiscal policy.

### **1.14.1. Requirements**

**Membership**— Maintain joint membership in the National Society and the Lincoln Chapter

**BOD Meetings**—Participate as a member of the Board of Directors which meets monthly in November (incoming), December (incoming), and January-December for the year of term in office.

**Membership Meetings**—Participate as a member in monthly programs and special events whenever possible.

**Succession Plan**—Maintain and update records relevant to position for benefit of successor as well as train successor in duties for the position during transition period prior to successor's term of office. Before end of Board term, recommend at least two potential candidates for the position.

**Leadership Development**—Attend the ASTD Leaders Conference in the year prior to term in Office when funds are available.

**Ethics**—Uphold the Lincoln Chapter By-Laws, Articles of Incorporation, Code of Ethics, and Chapter Operating Policies

### **1.14.2. Duties**

**Financial**— Prepare (with the assistance of the Administrative assistant) a monthly Budget Analysis, Balance Sheet, and Revenue Statement for board meetings. This shows year-to-date revenues and expenses and variations from budgeted amounts. Submit high-level financial report for publishing in the monthly newsletter. Submit high-level financial report for publishing in the monthly newsletter.

**Annual budget**— Submit annual budget with the assistance of the President and President-Elect.

**Committees**—Participate as a member of the following committees:

1. Risk Management Committee
2. Chair the Financial Review Committee

**Cash Disbursements**—pays all bills in a timely manner. If receiving a request for reimbursement, ensure accuracy before completing.

**Checkbook**—Check all deposits and bills as well as reconcile monthly bank statements. The Quicken software program is kept with the Administrative Assistant.

**Investments**— Monitor and record activity in investment accounts.

**Tax Preparation**— Assist with tax preparation due May 15 of each year. Tax preparation is done by CPA.

**Allocations**—coordinate with the President and the Vice President of Membership on how to allocate the money received from ASTD National for membership renewals.

**Other duties**— Shall have such other duties and responsibilities from time to time as assigned to

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him/her by the President.

## ***1.15. Vice President of Education & Research***

<b>Reports to:</b>	President
<b>Term of Service:</b>	15 months; renewable upon re-election (maximum of three (3) consecutive years)
<b>Selection:</b>	Elected by Chapter membership
<b>Eligibility:</b>	Chapter member in good standing; must have served as a Chapter Board member in the previous term; have or soon will receive CPLP
<b>Role:</b>	Provides membership educational resources, educates membership on certification/competency model, and supervises student chapter.

### **1.15.1. Requirements**

**Membership**— Maintain joint membership in the National Society and the Lincoln Chapter

**BOD Meetings**—Participate as a member of the Board of Directors which meets monthly in November (incoming), December (incoming), and January-December for the year of term in office.

**Membership Meetings**—Participate as a member in monthly programs and special events whenever possible.

**Succession Plan**—Maintain and update records relevant to position for benefit of successor as well as train successor in duties for the position during transition period prior to successor's term of office. Before end of Board term, recommend at least two potential candidates for the position.

**Leadership Development**—Attend the ASTD Leaders Conference in the year prior to term in Office when funds are available.

**Ethics**—Uphold the Lincoln Chapter By-Laws, Articles of Incorporation, Code of Ethics, and Chapter Operating Policies

### **1.15.2. Duties**

**Financial**—Review monthly Chapter financial statements.

**Web site**—Check relevant content on Chapter web site ([astdlincoln.org](http://astdlincoln.org)) and submit updates to Director of Web site, as needed.

**Annual budget**—Assist the VP in developing an annual budget for newsletter.

**Monthly Report**— Report on the activities of the committee and Student SIG at the board meetings.

**Committees**—Participate as a member of the following committees:

1. Risk Management Committee
2. Chair the Education and Research Committee which meets monthly.
  - a. Oversee Director of Certification and Competency and Student SIG Coordinator.
  - b. Ensure all committee members are in good standing.
  - c. Ensure all student members are qualified and in good standing.
  - d. Verify reimbursement requests from committee members and authorize payment.
3. Chair the Scholarship Committee, which oversees the administration of the Chapter's scholarship program. Keep the Director of Web site informed of scholarship recipients for posting on the Chapter web site.

**Student SIG**—Serve as the advisor for the Student SIG.

**Research**— Review and recommend the posting of Online Resources on the Chapter web site. Review

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books of interest to WLP/HRD practitioners. May be done periodically throughout the year and with the help of committee members.

**Education**—Work with Programming committee to communicate trends/research on hot topics in the field as well as categorize programming topics to the competencies. Review and provide direction to board on Research and Development needs to achieve chapter goals and objectives.

**Resource Library**—Manage and expand the resource library by periodically reviewing books of interest to WLP/HRD practitioners. May be done periodically throughout the year and with the help of committee members.

**Other duties**— Shall have such other duties and responsibilities from time to time as assigned to him/her by the President.

## ***1.16. Director of Competency & Certification***

<b>Reports to:</b>	VP of Membership
<b>Term of Service:</b>	15 months; renewable upon re-appointment (maximum of three (3) consecutive years)
<b>Selection:</b>	Appointed by President and VP of Communications
<b>Eligibility:</b>	Chapter member in good standing; have or soon will receive CPLP
<b>Role:</b>	Responsible for educating members on different facets of the competency model, i.e., informing members at monthly programs, literature reviews, visually displaying model at meetings, etc.

### **1.16.1. Requirements**

**Membership**— Maintain joint membership in the National Society and the Lincoln Chapter.

**BOD Meetings**—Participate as a member of the Board of Directors which meets monthly in November (incoming), December (incoming), and January-December for the year of term in office.

**Membership Meetings**—Participate as a member in monthly programs and special events whenever possible.

**Committee Meetings**—Actively participate as a member in monthly committee meetings and special activities.

**Succession Plan**—Maintain and update records relevant to position for benefit of successor as well as train successor in duties for the position during transition period prior to successor’s term of office. Before end of Board term, recommend at least two potential candidates for the position.

**Certification**—Takes certification test when prepared.

**Ethics**—Uphold the Lincoln Chapter By-Laws, Articles of Incorporation, Code of Ethics, and Chapter Operating Policies.

### **1.16.2. Duties**

**Financial**—Review monthly Chapter financial statements.

**Web site**—Check relevant content on Chapter web site ([astdlincoln.org](http://astdlincoln.org)) and submit updates to Director of Web site, as needed.

**Annual budget**—Assist the VP in developing an annual budget for newsletter.

**Competency model** —Educate membership on the competency model. This can be done at monthly programs, literature reviews, visually displaying model at meetings, etc. Ensure all programming events are mapped to the competency model.

**Certification and Certificates**—Responsible for communicating information regarding the ASTD national certification and certificates with members, i.e., dates/times of exams, updates on test, organizing study groups.

**Other duties**— Shall have such other duties and responsibilities from time to time as assigned to him/her by the VP or President.