



# **Upstate South Carolina ASTD Chapter Board of Directors Job Descriptions**

Revised: October 2012



## President – Upstate SC ASTD Job Description

### Responsibilities:

- Serve a term of one calendar year and the following year as Past President. Should the President serve more terms than one calendar year in accordance with the bylaws, the year as Past President shall begin at the completion of the final term as President.
- Manage the chapter in accordance with the chapter bylaws.
- 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.
- Upon taking office, announce chapter's annual plan and goals no later than January 31<sup>st</sup>.
- Get Board approval of annual budget no later than January 31<sup>st</sup>.
- 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 CORE guidelines.
- Submits CORE documentation, reporting on the President's term, by the deadline set by the ASTD National.
- Ensures the Board of Directors meets at least quarterly.
- Annual bylaws/mission/vision review.
- Work with the President-Elect to ensure a smooth transition of board rotation.
- Maintains and updates as needed a Chapter President Handbook to pass on to President-Elect.
- 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.
- Ensure each board member understands and can reply to questions regarding the benefits of membership.
- Perform whatever roles and responsibilities that are necessary to meet chapter goals.

### Resources:

- Be in possession of one of the chapter debit cards.
- Be in possession of one of the chapter mailbox keys.
- Have check-signing and contract-signing authority.
- Have full administrator access to the chapter's Wild Apricot association management system.
- Assigned Rackspace email address: [president@upstatesc.astd.org](mailto:president@upstatesc.astd.org)
- ASTD Chapter Leader Community <http://old.astd.org/membership/ChapterLeadership/>
- ASTD Chapter Services: <http://old.astd.org/membership/ChapterLeadership/ChapterManagement/Chapter+Services.htm>
- ASTD Leader Connection Newsletter: <http://old.astd.org/membership/ChapterLeadership/Resources/LCN.htm>
- ASTD Toolkits: <http://old.astd.org/membership/ChapterLeadership/Resources/Toolkits/>



#### Board Member Expectations and Code of Conduct:

- Be an Upstate SC ASTD chapter and ASTD National member in good standing.
- Attend at least four chapter events annually (excludes Board of Director meetings).
- Lead each Board of Director meeting held the 2<sup>nd</sup> Thursday of each month from 5:30 – 7:30 p.m. (complimentary light dinner included).
- Lead the annual Board of Director Planning Retreat to be held on a Saturday in January 2013 from 8 a.m. to 12 noon. Date will be finalized once new board is polled for availability.
- Become familiar with and abide by Upstate SC ASTD's by-laws, policies and procedures.
- *Proactively* execute the responsibilities for the role taken on the board. Be accountable for projects not only to the other board members but also to the chapter membership.
- Create a Transition Package for successor that includes forms, budgets, processes, and recommendations.
- Serve as a fair and open clearinghouse for information, job opportunities, and professional training and vendor services to any member of Upstate SC ASTD.
- Board members will not use their position to have increased access to chapter members or use their influence to direct business to a specific organization or vendor.
- Facilitate programs and events for the benefit of Upstate SC ASTD members that provide meaningful experiences that are used as learning opportunities and not a venue to push products or services.
- Represent the chapter both professionally and ethically in all business functions and organizational activities.

Revised October 2012



## President-Elect – Upstate SC ASTD Job Description

Act for the President in the President's absence. Work with the President in preparation for assuming the role the following year. Forms and serves as the chair of the Nominating Committee and facilitates planning in preparation for term as President. Perform other duties as needed. This begins a three-year position on the board – 1<sup>st</sup> year as President-Elect, 2<sup>nd</sup> year as President and 3<sup>rd</sup> year as Past President.

### Responsibilities:

- Serve a term of one calendar year as President-Elect and the following term of one calendar year as President, and the following year as Past President.
- Act for the President in his or her absence.
- Form and chair the Nominating Committee and manage election process for upcoming year's board.
  - Email current board to ask of their plans for upcoming year.
  - Determine appropriate Board line-up to support the upcoming year's chapter goals
  - Revise Job Descriptions for the board line-up to support the upcoming year's chapter goals as well as its long-range goals.
  - Revise the Call for Nominations document and set appropriate deadlines for election process.
  - Once board approves both documents, send out notice to membership.
  - Receive nominations and recruit for any open positions.
  - Once board approves the slate of officers, send out to membership for a vote. Survey Monkey is traditionally used for the election process.
- Facilitate strategic planning in preparation for term as President.
- Assume the office of President in accordance with the chapter bylaws should the President be unable to fulfill his or her term.
- Serve on a Financial Review Committee if needed.
- Attend the ASTD 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.)
- Learn as much as possible about the workings of the chapter and ASTD national, particularly CORE requirements, chapter history, and the roles and responsibilities of each board position.
- Assist board members as needed.
- Update Treasurer and provide documentation of any expenditure related to the office.
- Understand and reply to questions regarding the benefits of membership.
- Perform whatever roles and responsibilities that are necessary to meet chapter goals.

### Resources:

- Be in possession of one of the chapter debit cards.
- Be in possession of one of the chapter mailbox keys.
- Have check-signing and contract-signing authority for events and expenditures that will take place in the President-Elect's term of office as President.
- Full administrator access to the chapter's Wild Apricot association management system.
- No Rackspace email address is designated for this role at this time as this person takes on other roles on the board and assumes another email address.
- ASTD Chapter Leader Community <http://old.astd.org/membership/ChapterLeadership/>
- ASTD Chapter Services: <http://old.astd.org/membership/ChapterLeadership/ChapterManagement/Chapter+Services.htm>
- ASTD Leader Connection Newsletter: <http://old.astd.org/membership/ChapterLeadership/Resources/LCN.htm>



- ASTD Toolkits: <http://old.astd.org/membership/ChapterLeadership/Resources/Toolkits/>

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- Attend at least four chapter events annually (excludes Board of Director meetings).
- Attend and report on respective area at each Board of Director meeting held the 2<sup>nd</sup> Thursday of each month from 5:30 – 7:30 p.m. (complimentary light dinner included).
- Attend the annual Board of Director Planning Retreat to be held on a Saturday in January 2013 from 8 a.m. to 12 noon. Date will be finalized once new board is polled for availability.
- Become familiar with and abide by Upstate SC ASTD's by-laws, policies and procedures.
- *Proactively* execute the responsibilities for the role taken on the board. Be accountable for projects not only to the other board members but also to the chapter membership.
- Create a Transition Package for successor that includes forms, budgets, processes, and recommendations.
- Serve as a fair and open clearinghouse for information, job opportunities, and professional training and vendor services to any member of Upstate SC ASTD.
- Board members will not use their position to have increased access to chapter members or use their influence to direct business to a specific organization or vendor.
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- Represent the chapter both professionally and ethically in all business functions and organizational activities.

Revised October 2012



## Past-President – Upstate SC ASTD Job Description

### Responsibilities:

- Assist the President and President-Elect when necessary.
- Serve for one calendar year.
- Help President ensure that chapter officers fulfill requirements.
- Submit CORE application by national deadline (reporting on prior year, or term of office as President).
- Submit new board roster to National Society by national deadline.
- Update Treasurer and provide documentation on any expenditure 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.

### Resources:

- Full administrator access to the chapter's Wild Apricot association management system.
- No Rackspace email address is designated for this role at this time as this person takes on other roles on the board and assumes another email address.
- ASTD Chapter Leader Community <http://old.astd.org/membership/ChapterLeadership/>
- ASTD Leader Connection Newsletter: <http://old.astd.org/membership/ChapterLeadership/Resources/LCN.htm>
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### Board Member Expectations and Code of Conduct:

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- Attend at least four chapter events annually (excludes Board of Director meetings).
- Attend and report on respective area at each Board of Director meeting held the 2<sup>nd</sup> Thursday of each month from 5:30 – 7:30 p.m. (complimentary light dinner included).
- Attend the annual Board of Director Planning Retreat to be held on a Saturday in January 2013 from 8 a.m. to 12 noon. Date will be finalized once new board is polled for availability.
- Become familiar with and abide by Upstate SC ASTD's by-laws, policies and procedures.
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## Treasurer – Upstate SC ASTD Job Description

Responsible for developing annual budget, monitoring budget, paying all expenses, and managing Chapter checking account. Works closely with President and all Board Members to keep the Chapter on budget and develop ways to increase revenues, including programs such as Season Pass, sponsorships, and Vendor Directory. The treasurer reports on the financial condition of the chapter at Board meetings and at other times when called upon by the President. Works with the Director of Hospitality at the registration table for each event and creates a Meeting Reconciliation report after each event.

### Responsibilities:

- Serve a term of one calendar year.
- With the President and 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 independent auditor with 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.
- Collect and act as custodian of all funds. This includes sitting with Director of Hospitality at registration table during chapter meetings and events.
- Keep accurate records of all income and expenditures.
- Provide monthly financial status report to the Board.
- Create a Meeting Reconciliation report after each event.
- Manage the coordination of signature cards, debit cards, etc. for all officers requiring and permitted such access.
- Take control of chapter checkbook on Quicken, keeping up-to-date with entries.
- Take control of chapter financial records and maintain in orderly manner.
- Reconcile monthly bank statement.
- Take in dues as well as fees at monthly meetings.
- Pay for any expenses incurred. This includes purchasing speaker gifts and giveaways for chapter meetings.
- Ensure receipts, pens and petty cash are available at meetings and events.
- Check Post Office Box regularly and process financial-related 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.
- Collaborate with VP of Technology, VP of Programs, and VP of Event Promotions to set up and maintain system within Wild Apricot for collecting money for Season Pass program.
- Collaborate with VP of Community Relations for invoicing and collecting money for all sponsorships obtained as well as from Vendor Directory participants.
- Provide financial statement to board of directors at least quarterly.
- Solicit budget input from board members.
- Prepare chapter's year-end financial statement, including all reports necessary to submit with CORE report.
- File the 990N with the IRS by the annual deadline.



- Manage the Chapter Incentive Program (CHIP) as it relates to our chapter. Recommend ways chapter can take advantage of this program in order to increase revenue. Also, work with VP of Member Communications and VP of Technology for communicating this information to membership via newsletter and website.
- 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.

#### Resources:

- Full administrator access to the chapter's Wild Apricot association management system.
- Assigned Rackspace email address: [treasurer@upstatesc.astd.org](mailto:treasurer@upstatesc.astd.org)
- ASTD Chapter Leader Community <http://old.astd.org/membership/ChapterLeadership/>
- ASTD Leader Connection Newsletter: <http://old.astd.org/membership/ChapterLeadership/Resources/LCN.htm>
- ASTD Financial Resource: <http://old.astd.org/membership/ChapterLeadership/Financial/>
- ASTD CHIP: <http://old.astd.org/membership/ChapterLeadership/Financial/chapterIncentiveProgram.htm>
- ASTD Toolkits: <http://old.astd.org/membership/ChapterLeadership/Resources/Toolkits/>

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## Secretary – Upstate SC ASTD Job Description

Records the meeting minutes for all Board of Director proceedings and ensures the integrity of Board documents. In his or her absence, a Secretary pro tempore, may be appointed by the President.

### Responsibilities:

- Serve a term of one calendar year.
- Record minutes of Board of Directors meetings. Upon approval by the Board of Directors, ensure with VP of Technology, that minutes are posted in the members-only section of the chapter website.
- Work with VP of Technology if needed to set up Board of Directors only section of website. This section is to serve as a repository for all board-related documentation.
- Understand and reply to questions regarding the benefits of membership.
- Maintain and update chapter leadership roster and organizational chart then post to chapter website.
- Work with VP of Technology when needed to ensure chapter leadership photos and bios are posted to website.
- Assist President-Elect however necessary to ensure transition of office.
- Update Treasurer and provide documentation of any expenditure related to the office.
- Perform whatever roles and responsibilities that are necessary to meet chapter goals.

### Resources:

- Limited administrator access to the chapter's Wild Apricot association management system.
- Assigned Rackspace email address: [secretary@upstatesc.astd.org](mailto:secretary@upstatesc.astd.org)
- ASTD Chapter Leader Community <http://old.astd.org/membership/ChapterLeadership/>
- ASTD Leader Connection Newsletter: <http://old.astd.org/membership/ChapterLeadership/Resources/LCN.htm>
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## Vice President of Community Relations – Upstate SC ASTD Job Description

Leads the Community Relations committee to develop a sponsorship package and to seek sponsorship opportunities for chapter meetings and special events. This would include developing the guidelines, promoting, and setting up a Vendor Directory as a revenue stream on the chapter website. Acting in accordance with the chapter by-laws, explore community opportunities and represent the chapter on outside committees involved with public policy issues as they relate to the learning and performance field.

### Responsibilities:

- Serve a term of one calendar year.
- Recruit committee members. May spread the responsibilities among the committee by appointing separate directors within the committee to focus on each of the focus areas.
- Sponsorships
  - Develop and implement strategy to identify, engage and motivate sponsors for chapter meetings and special events.
  - Work with President, Treasurer, and Board to set rates for sponsorships and advertising.
  - Produce a sponsorship package document to be used by VP and committee members to promote sponsorship opportunities to prospects, facilitate subsequent transactions, and post to chapter website.
  - Work with board members to negotiate/obtain sponsorships.
  - Work with Treasurer to ensure sponsorship invoices have been generated in a timely manner.
  - Follow up with sponsor and Treasurer to ensure payment has been received prior to supported chapter meeting, special event, or activity.
  - Work closely with VP of Programs to ensure all commitments for space and time during chapter meeting, special event, or activity have been successfully planned for in advance.
  - Work closely with VP of Technology to manage the “Sponsors” tab on the chapter website.
- Vendor Directory
  - Develop the strategy to set up a Vendor Directory as a revenue stream on the chapter website.
  - Incorporate this opportunity into the sponsorship package document to be used by VP and committee members to promote sponsorship opportunities to prospects.
  - Work with the VP of Technology to manage “Vendor Directory” tab on chapter website and to post vendor advertising.
  - Work with Treasurer to ensure invoices have been generated in a timely manner.
  - Follow up with vendor and Treasurer to ensure payment has been received prior to posting advertising to website.
- Public Policy
  - Acting in accordance with the chapter by-laws, explore any community opportunities and represent the chapter on outside committees involved with public policy issues as they relate to the workplace learning and performance field.
  - Once public policy issues are identified, develop strategy for how chapter could become involved.



#### Resources:

- Limited administrator access to the chapter's Wild Apricot association management system.
- Assigned Rackspace email address: [community@upstatesc.astd.org](mailto:community@upstatesc.astd.org)
- ASTD Chapter Leader Community <http://old.astd.org/membership/ChapterLeadership/>
- ASTD Leader Connection Newsletter: <http://old.astd.org/membership/ChapterLeadership/Resources/LCN.htm>
- ASTD Public Policy Resources:  
<http://old.astd.org/membership/ChapterLeadership/Resources/Public+Policy+Resources.htm>
- ASTD Toolkits: <http://old.astd.org/membership/ChapterLeadership/Resources/Toolkits/>

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Revised October 2012



## Vice President of Programs – Upstate SC ASTD Job Description

Lead the program committee that is responsible for identifying relevant topics and qualified speakers. Topics will align with the ASTD competency model and reflect the results of our annual member survey and outreach efforts. This VP is responsible for the speaker's needs including A/V as well as distributing evaluations at each meeting and tracking the results for analysis and action. Set up the Event Registration Calendar in Wild Apricot and upload the speaker details for each meeting for use in developing PR activities and email blasts.

### Responsibilities :

- Serve a term of one calendar year.
- Recruit committee members and appoint when possible a VP “trainee,” who would be next in line pending nomination and vote and who would fill in for VP if VP is unable to attend board meetings.
  - These committee members should regularly attend chapter meetings and participate in planning meetings/conference calls as needed.
- Speaker/Topic Selection and Management
  - Monthly programs and speakers for each calendar year should be lined up by the fall of the previous year.
    - This allows for the promotion of the Season Pass system (launched for 2013 program year). Collaborate with the Treasurer and VP of Technology in managing the Season Pass system.
    - No meeting for July
    - Currently meetings are held the 4<sup>th</sup> Thursday of the month except for November due to holiday conflict and December in order to celebrate Employee Learning Week
  - Hold at least one Workshop a year.
  - Maintain Excel spreadsheet of “Potential Speakers.”
    - This includes receiving phone calls and emails regarding program ideas from other board members, members, unsolicited sources, as well as those sent directly to [programs@upstatesc.astd.org](mailto:programs@upstatesc.astd.org) from the chapter website.
    - This spreadsheet should include separate tabs listing the previous years’ programs to serve as a reference. There should be at least three years of past programs available for reference. This avoids repeating a speaker or topic too soon.
  - Research and identify appropriate/qualified speakers and relevant topics within and outside of membership and within budget. Topics should align with the ASTD competency model and reflect the results of annual member survey and outreach efforts.
  - Review and negotiate speaker contracts if applicable.
  - Provide speaker with
    - Directions to meeting site
    - Audience expectations
    - Agenda with presentation length
    - Lodging and transportation information, if needed
  - Gather essential information from speaker:
    - Bio with presentation details and photo
    - A/V needs
    - Room set up preference, if any
    - Presentation handouts and/or electronic copy



- Request permission from speaker to post copy of presentation on website.
  - Set up all event registrations in Wild Apricot by end of previous calendar year and upload speaker bio with presentation details and photo into the event details box. Work with VP of Event Promotions for shaping this information into appropriate promotional wording.
  - Monitor website for accuracy of event descriptions, speaker photo and bios, and ensure annual calendar remains up-to-date.
    - Provide speaker bio for introduction of the speaker.
    - Update when necessary, distribute and collect a speaker evaluation sheet. Prepare an evaluation summary and distribute to Board members and Program Committee following each event.
- Meeting and Location Tasks
  - Determine meeting dates and procure / negotiate agreements with host site(s) for calendar year during the fall of the previous year. (see Director of Hospitality below)
  - Communicate room set-up and A/V needs to host site, and arrange technical support during meeting.
  - Update Treasurer and provide documentation on any related expenditures.
  - Arrive no later than 30 minutes prior to meeting start to greet speaker as well as approve room and A/V set up.
  - Supervise the Director of Hospitality in managing the registration table as described below.
- Collaborate with Treasurer and VP of Event Promotions to set up and launch Season Pass program for upcoming year. Work with VP of Event Promotions to write Season Pass promotional materials.
- General/Coordination with other Committees or Organizations
  - Attend scheduled board meetings and report on activities of Program Committee.
  - Perform whatever roles and responsibilities that are necessary to meet chapter goals.
  - May work with other professional organizations, approved by the Board, to co-sponsor relevant events. This VP acts as the chapter liaison to the Greater Greenville Chamber of Commerce and the Greenville Chapter of the Society of Human Resource Management (GSHRM).
- Serve as Chapter Liaison to GSHRM:
  - Contact GSHRM to learn of chapter's organizational structure and points of contact
  - Set up meeting to determine interest in holding joint meeting.
  - Ask for dates of annual GSHRM conference. Learn what PR opportunities may exist for ASTD such as speaker, flyer for stuff sacks, door prize, or ASTD exhibit table. Collaborate with VP of Membership.
- Appoint Director of Employee Learning Week to manage the Training and Development Awards of Excellence competition and design a celebration of the annual Employee Learning Week.
  - Research, propose to board, and implement approved plan for Employee Learning Week held the first week of December.
    - Obtain proclamations from City of Greenville, Greenville County, and State of SC.
    - Collaborate with VP of Member Communications to develop PR plan
    - Collaborate with VP of Programs for December event celebration
    - Collaborate with VP of Community Relations to find sponsorships for the celebration
  - Further develop the Training and Development Awards of Excellence competition. Based on inaugural year results, research, propose to board, and implement approved plan.
    - Write a Call for Entries document
    - Receive entries and recruit judges
    - Supervise the judging process by providing judges with scoring instructions
    - Contact the award winners
    - Collaborate with VP of Member Communications to develop PR plan and implement plan
    - Collaborate with VP of Programs to recognize award recipients during December meeting
    - Collaborate with VP of Community Relations to find sponsorships for the awards.



- Appoint Director of Hospitality to manage the registration table at chapter meetings and special events. This includes monitoring the Wild Apricot event attendee list and the chapter PayPal account; printing name tags; collecting money for manual payments; and collecting business cards for drawings. Other responsibilities include arranging for the meeting venue and catering; collaborating with the Program Chair to set up the room and signage prior to each meeting; and collaborating with the Treasurer who creates the Meeting Reconciliation report after each event. Responsibilities include:
  - Serve on Program Committee
  - Schedule meeting place(s) for all programs and special events for the upcoming calendar year during the fall of the previous year.
    - Due the first week of November, the University Center of Greenville’s Director of Operations issues a space request form to reserve the UCG Auditorium for the upcoming calendar year.
    - Re-confirm each month with the UCG Director of Operations as the program date draws near.
  - Coordinate meeting location needs and special requests with VP of Programs, VP of Community Relations, VP of Professional Development, and the Board. For example, VP of Community Relations may have a meeting sponsor who has been promised display space.
  - Coordinate meeting location needs and special requests with VP of Technology and VP of Special Events for any events held in a different location from regular scheduled chapter meetings.
  - Schedule catering service and menu for each program within board-approved budget. These arrangements are to be made in advance of scheduled meetings assuming minimum orders. Catering service vendor also to be board approved.
  - Monitor RSVPs on Wild Apricot for each program to include:
    - Ensure RSVP receipt/thanks automatic e-mail to each attendee is set up on Wild Apricot
    - Monitor RSVP list for registration payment status
    - Print out attendee list to check in attendees at registration table
    - Print out name tags
  - Copy President and VP of Programs on all meeting arrangement communications. Also, copy other VPs connected to the event in question.
  - Trouble-shoot any emergencies (for example: room not set up, catering not arriving, not enough utensils, identifying any safety hazards in the room).
  - Set up chapter signage to direct attendees to meeting room. These include:
    - Outdoor sign to be placed at UCG entrance
    - “Sandwich board” sign to be placed inside UCG entrance
    - Stand-up sign to be placed at meeting room entrance
    - Logo tablecloth to be placed on registration table
  - Collaborate with Treasurer to manage the registration table at all chapter meetings and special events, including collecting money for manual payments and business cards for drawings. Provide any details to Treasurer who creates the Meeting Reconciliation report after each event.
  - Break down registration table and signage after each meeting and return to chapter office.



#### Resources:

- Limited administrator access to the chapter's Wild Apricot association management system.
- Assigned Rackspace email address: [programs@upstatesc.astd.org](mailto:programs@upstatesc.astd.org)
- ASTD Chapter Leader Community <http://old.astd.org/membership/ChapterLeadership/>
- ASTD Leader Connection Newsletter: <http://old.astd.org/membership/ChapterLeadership/Resources/LCN.htm>
- ASTD Chapter Speaker Resources: <http://old.astd.org/membership/ChapterLeadership/Resources/SpeakerResources.htm>
- ASTD Toolkits: <http://old.astd.org/membership/ChapterLeadership/Resources/Toolkits/>

#### Board Member Expectations and Code of Conduct:

- Be an Upstate SC ASTD chapter member in good standing. It is preferable but not required that this board member also be a national ASTD member.
- Attend at least four chapter events annually (excludes Board of Director meetings).
- Attend and report on respective area at each Board of Director meeting held the 2<sup>nd</sup> Thursday of each month from 5:30 – 7:30 p.m. (complimentary light dinner included).
- Attend the annual Board of Director Planning Retreat to be held on a Saturday in January 2013 from 8 a.m. to 12 noon. Date will be finalized once new board is polled for availability.
- Become familiar with and abide by Upstate SC ASTD's by-laws, policies and procedures.
- *Proactively* execute the responsibilities for the role taken on the board. Be accountable for projects not only to the other board members but also to the chapter membership.
- Create a Transition Package for successor that includes forms, budgets, processes, and recommendations.
- Serve as a fair and open clearinghouse for information, job opportunities, and professional training and vendor services to any member of Upstate SC ASTD.
- Board members will not use their position to have increased access to chapter members or use their influence to direct business to a specific organization or vendor.
- Facilitate programs and events for the benefit of Upstate SC ASTD members that provide meaningful experiences that are used as learning opportunities and not a venue to push products or services.
- Represent the chapter both professionally and ethically in all business functions and organizational activities.

Revised October 2012





## Vice President of Professional Development – Upstate SC ASTD Job Description

Actively promote the Certified Professional in Learning and Performance program to our chapter membership and serve as liaison to Greater Atlanta Chapter regarding any virtual study group opportunity. Additional responsibilities include researching and writing proposal to host ASTD National seminar at UCG in 2014. Also, researching, proposing, and implementing other certification programs where specific chapter meetings and workshops could qualify to offer CPE or other professional credits as required in other fields.

### Responsibilities:

- Serve a term of one calendar year.
- Recruit committee members as needed.
- Promote Certified Professional in Learning and Performance (CPLP) program:
  - Recruit CPLP candidates within chapter.
  - Maintain and further develop an ongoing plan to promote the CPLP program to membership while building on the efforts from previous years.
  - Collaborate with VP of Member Communications to educate membership of the benefits either through newsletter or special email blasts. In addition, recognize CPLP candidates' participation when appropriate at chapter meetings or through newsletter, news blog, and social media. Also may include setting up a display at chapter meetings, or creating a "CPLP Minute" segment on chapter meeting program agenda or giving presentation at chapter meeting.
  - Maintain CPLP tab on chapter website. Ensure all links remain current and information up to date.
  - Maintain supply of CPLP materials from ASTD National in chapter office and ensure they are placed at registration table at each chapter meeting and event.
  - Manage the chapter's two CPLP Learning Systems, the practice exam DVD, and the flash card set. Keep track of who has borrowed these resources to prevent them from being lost.
  - Communicate with ASTD National CPLP contact to ensure our chapter is current with all CPLP-related details regarding resources, testing dates, updates, and recertification.
  - Follow up with members who have achieved their CPLP credential to assist with recertification needs as necessary.
  - Communicate with chapter members who have expressed interest in CPLP and those studying for the exam. For example, use the Special Interest Group (SIG) concept to host study events for this groups.
- Be Liaison to Greater Atlanta Chapter
  - Represent Upstate SC ASTD by participating in conference call meetings with Greater Atlanta Chapter in coordinating participation of any CPLP candidates to participate in CPLP Virtual Study Group, if this is being offered.
  - Collaborate with VP of Member Communications to promote this opportunity to membership.
  - Coordinate all details with the Greater Atlanta Chapter and relay information to CPLP candidates.
  - Arrange meeting space and logistics for all face-to-face meetings. Also, arrange for presenters to contribute to any of the study sessions, if requested.
- Lead the Effort for Hosting an ASTD National Seminar in Greenville in 2014
  - Research and write proposal for October 2013 deadline for our chapter to host an ASTD National seminar at UCG in 2014.
  - Continue effort started in 2012 to meet this goal.
  - Communicate with ASTD National contact to keep current on requirements and deadline.
- Continuing Professional Education (CPE) Credits
  - Research CPE or other types of professional credit requirements.
  - Determine if chapter meetings can qualify to offer these types of credits.





- Develop a plan, propose to Board for approval, and implement plan.

#### Resources:

- Limited administrator access to the chapter's Wild Apricot association management system.
- Assigned Rackspace email address: [prodevelopment@upstatesc.astd.org](mailto:prodevelopment@upstatesc.astd.org)
- ASTD Chapter Leader Community <http://old.astd.org/membership/ChapterLeadership/>
- ASTD Leader Connection Newsletter: <http://old.astd.org/membership/ChapterLeadership/Resources/LCN.htm>
- ASTD Toolkits: <http://old.astd.org/membership/ChapterLeadership/Resources/Toolkits/>

#### Board Member Expectations and Code of Conduct:

- Be an Upstate SC ASTD chapter member in good standing. It is preferable but not required that this board member also be a national ASTD member.
- Attend at least four chapter events annually (excludes Board of Director meetings).
- Attend and report on respective area at each Board of Director meeting held the 2<sup>nd</sup> Thursday of each month from 5:30 – 7:30 p.m. (complimentary light dinner included).
- Attend the annual Board of Director Planning Retreat to be held on a Saturday in January 2013 from 8 a.m. to 12 noon. Date will be finalized once new board is polled for availability.
- Become familiar with and abide by Upstate SC ASTD's by-laws, policies and procedures.
- *Proactively* execute the responsibilities for the role taken on the board. Be accountable for projects not only to the other board members but also to the chapter membership.
- Create a Transition Package for successor that includes forms, budgets, processes, and recommendations.
- Serve as a fair and open clearinghouse for information, job opportunities, and professional training and vendor services to any member of Upstate SC ASTD.
- Board members will not use their position to have increased access to chapter members or use their influence to direct business to a specific organization or vendor.
- Facilitate programs and events for the benefit of Upstate SC ASTD members that provide meaningful experiences that are used as learning opportunities and not a venue to push products or services.
- Represent the chapter both professionally and ethically in all business functions and organizational activities.

Revised October 2012



## Vice President of Membership – Upstate SC ASTD Job Description

Lead the membership committee that is responsible for the development and implementation of the chapter's membership strategy, including annual goals and programs to retain and recruit members. Additional responsibilities include creating new member orientation (onboarding) program, communicating with ASTD National for update on national membership list, and managing the Wild Apricot contact database. In addition, this VP is to appoint directors for student outreach and for the job listing service.

### Responsibilities:

- Serve a term of one calendar year.
- Solicit committee members and appoint Director who would be the VP “trainee”, next in line pending nomination and vote. Director would fill in for VP if VP can't make board meetings.
- Develop and implement the membership strategy for the chapter that includes annual goals and programs to retain and recruit new members. Draw ideas from ASTD National resources and other chapters.
- Establish strategies for local and national member recruitment and retention. Strategies may include:
  - Awards or incentive programs
  - New member orientation program (onboarding)
  - Submitting names of new members and/or member highlights to newsletter
- Review the “Power of 2” resources from ASTD National. Develop, propose, and implement this program as it best fits our chapter. Ensure that chapter members know they must renew with the chapter directly and then they should renew with National directly in order to receive discount. It does not work in reverse.
- Quarterly communication with National for new and renewing national members. Develop strategies and implement them for recruiting local National members who are not also chapter members.
- Have the primary responsibility for maintaining the Contacts and Members database in Wild Apricot. All board members will have access to the database, but this VP is responsible for monitoring it for overall accuracy.
- Continue with work started in 2012 on adding Organizational Contacts to chapter's contact list in Wild Apricot. Set up task force from list of “quick turnaround project” volunteers to call and ask for missing email addresses.
- Maintain the automatic welcome letter in Wild Apricot that goes to members as they join.
- Maintain automatic renewal notices in Wild Apricot to go to members whose memberships are up for renewal.
- Monitor Wild Apricot on a frequent basis for new member activity. Activate new and paid memberships within 48 hours.
- Monitor Wild Apricot for Membership Renewals and follow up on those not responding in a timely manner.
- Understand and respond to requests about benefits of membership.
- Contribute to annual member survey in order to poll members for ideas to stimulate growth.
- Confirm that Treasurer is listed in Wild Apricot to receive copies of automated membership payment emails so he/she can monitor activity and ensure all fees are collected.
- Confirm that payment is received from each new and renewing member. Collaborate with Treasurer on this.
- Report membership statistics at each Board of Directors meeting.
- Encourage applications for membership processing via website; if membership application is submitted on paper, ensure collection of fee and give to Treasurer within 48 hours of receipt.
- Collaborate with VP of Programs to network with GSHRM and promote ASTD at GSHRM annual conference as a membership recruitment effort.
- Update Treasurer and provide documentation of any expenditure related to the office.
- Perform whatever roles and responsibilities that are necessary to meet chapter goals.
- Serves as Chapter Liaison to Greater Greenville Chamber of Commerce:



- The chapter is a chamber member. This membership serves as an outlet for recruiting new members, getting the word out about ASTD, and hearing of local learning and workplace performance issues.
- Monitor chamber communications for weekly event opportunities. Forward any events of interest to the Board. This VP may also attend any chamber events, too.
- Appoint Director of Job Listing Service to manage this member benefit.
  - Manage the Job Listing Service tab in the members-only section of the chapter website.
  - Research sources with workplace and learning performance job opportunities and list on service.
  - Follow up and verify job posting leads that come via emails or phone calls and list on service.
  - Collaborate with VP of Member Communications to promote this service to contact database.
- Appoint a Director of Student Outreach to promote awareness of options available to students in the workplace and learning performance field. Responsibilities may include:
  - Research and list all universities and colleges in the Upstate that are offering degrees and/or courses related to the workplace and learning performance field. In addition, develop a list of professors teaching these courses, contact them, and ask permission to add to contact database.
  - Develop a plan, propose to board, and implement a student member recruitment program.
  - Identify student member benefits to offer. This may include a Special Interest Group (SIG) just for student members, mentor relationships, and resume/interviewing coaching.
  - Be a liaison with the Upstate universities and colleges for communicating internship candidates to chapter membership
  - Develop, propose, and implement a student scholarship program:
    - Work with VP of Technology as needed to set up the “Donations” function in Wild Apricot.
    - Launch a scholarship fund campaign to raise money for the scholarship.
    - Promote scholarship opportunity to target audience.
    - Review applications and select a recipient.
    - Collaborate with the VP of Programs to schedule the scholarship award presentation.
    - Work with VP of Member Communications to write and distribute a press release announcing the recipient as well as promoting the sponsors.

#### Resources:

- Full administrator access to the chapter’s Wild Apricot association management system.
- Assigned Rackspace email address: [membership@upstatesc.astd.org](mailto:membership@upstatesc.astd.org)
- ASTD Chapter Leader Community <http://old.astd.org/membership/ChapterLeadership/>
- ASTD Leader Connection Newsletter: <http://old.astd.org/membership/ChapterLeadership/Resources/LCN.htm>
- ASTD Power of 2: <http://old.astd.org/membership/ChapterLeadership/Membership/>
- ASTD Toolkits: <http://old.astd.org/membership/ChapterLeadership/Resources/Toolkits/>

#### Board Member Expectations and Code of Conduct:

- Be an Upstate SC ASTD chapter member in good standing. It is preferable but not required that this board member also be a national ASTD member.
- Attend at least four chapter events annually (excludes Board of Director meetings).
- Attend and report on respective area at each Board of Director meeting held the 2<sup>nd</sup> Thursday of each month from 5:30 – 7:30 p.m. (complimentary light dinner included).
- Attend the annual Board of Director Planning Retreat to be held on a Saturday in January 2013 from 8 a.m. to 12 noon. Date will be finalized once new board is polled for availability.
- Become familiar with and abide by Upstate SC ASTD’s by-laws, policies and procedures.
- *Proactively* execute the responsibilities for the role taken on the board. Be accountable for projects not only to the other board members but also to the chapter membership.



- Create a Transition Package for successor that includes forms, budgets, processes, and recommendations.
- Serve as a fair and open clearinghouse for information, job opportunities, and professional training and vendor services to any member of Upstate SC ASTD.
- Board members will not use their position to have increased access to chapter members or use their influence to direct business to a specific organization or vendor.
- Facilitate programs and events for the benefit of Upstate SC ASTD members that provide meaningful experiences that are used as learning opportunities and not a venue to push products or services.
- Represent the chapter both professionally and ethically in all business functions and organizational activities.

Revised October 2012



## Vice President of Event Promotions – Upstate SC ASTD Job Description

Lead the committee that is responsible for all promotional activities for the chapter. This includes creating email blasts, press releases and flyers associated with meetings. This VP is responsible for ensuring that all event registrations set up in Wild Apricot by the VP of Programs and/or VP of Technology are finalized and ready for the email blasts. Starting with a 30-day promotion period for each event, this VP schedules up to six email blasts to run on a weekly basis and a daily blast occurring the last three days prior to each event. In addition, this VP is responsible for creating and maintaining a media list of all business calendars opportunities for Upstate SC and Western NC and submitting a press release prior to each event conducive to media deadlines. This includes updating the chapter website home page with each new chapter meeting promotion and co-managing the chapter's social media accounts on Facebook, LinkedIn, and Twitter as they relate to promoting all chapter events. This VP also manages a Phone Tree Calling effort prior to each chapter event.

### Responsibilities:

- Serve a term of at least one calendar year.
- Recruit committee members as needed and appoint Director who would be the VP “trainee”, next in line pending nomination and vote. Director would fill in for VP if VP can't make board meetings.
- Learn how to use Wild Apricot and develop a subject matter expertise on the Event Registration section.
- Manage event announcement function in Wild Apricot. Starting with a 30-day promotion period for each event, finalize and schedule six event announcements (email blasts) to all members and contacts to run on a weekly basis with a daily blast occurring the last three days prior to each event.
- Know, understand and implement ASTD logo guidelines from National as well as for the chapter.
- Collaborate with VP of Member Communications to establish and maintain a media list of all relevant business media in Upstate SC and Western NC. This should include all available and relevant business calendar opportunities found not only in traditional media outlets but also through other organizations such as Swamp Fox, GSATC, and Greater Greenville Chamber of Commerce.
- Write and submit press release prior to each event conducive to varying media deadlines.
- Update the website's homepage with each new chapter meeting promotion.
- Collaborate with VP of Member Communications and VP of Technology in managing the chapter's social media accounts on Facebook, LinkedIn, and Twitter as they relate to promoting all chapter events.
- Collaborate with VP of Programs and VP of Membership to set up a Phone Tree Calling effort prior to each chapter meeting :
  - Email board to ask for callers. May extend this effort to a group of volunteers.
  - Export membership list from Wild Apricot into an Excel spreadsheet deleting names of board members and those already registered for event
  - Write talking points for event with voicemail 25-second script
  - Divide calling list equally among callers. Ideally, it's best to have at least four callers as this allows for 11-12 calls only per caller. Set up separate lists for each caller to avoid confusion and duplicate calls. Also, delete unnecessary columns from spreadsheet but ensure there is a “Notes” column. (Use past lists as a reference.)
  - Email list, talking points, and script to all callers no later than Monday prior to chapter meeting. Allow at least three days for making the calls. (Use past emails as a reference.)
- Collaborate with VP of Member Communications in creating the chapter's Communications Plan.
- 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.



#### Resources:

- Full administrator access to the chapter's Wild Apricot association management system.
- Assigned Rackspace email address: [promotions@upstatesc.astd.org](mailto:promotions@upstatesc.astd.org)
- ASTD Chapter Leader Community <http://old.astd.org/membership/ChapterLeadership/>
- ASTD Leader Connection Newsletter: <http://old.astd.org/membership/ChapterLeadership/Resources/LCN.htm>
- ASTD Marketing Resources: <http://old.astd.org/membership/ChapterLeadership/Resources/Chapter+Marketing+Resources.htm>
- ASTD Chapter Logo: <http://old.astd.org/membership/ChapterLeadership/Resources/Chapterlogos.htm>
- ASTD Toolkits: <http://old.astd.org/membership/ChapterLeadership/Resources/Toolkits/>

#### Board Member Expectations and Code of Conduct:

- Be an Upstate SC ASTD chapter member in good standing. It is preferable but not required that this board member also be a national ASTD member.
- Attend at least four chapter events annually (excludes Board of Director meetings).
- Attend and report on respective area at each Board of Director meeting held the 2<sup>nd</sup> Thursday of each month from 5:30 – 7:30 p.m. (complimentary light dinner included).
- Attend the annual Board of Director Planning Retreat to be held on a Saturday in January 2013 from 8 a.m. to 12 noon. Date will be finalized once new board is polled for availability.
- Become familiar with and abide by Upstate SC ASTD's by-laws, policies and procedures.
- *Proactively* execute the responsibilities for the role taken on the board. Be accountable for projects not only to the other board members but also to the chapter membership.
- Create a Transition Package for successor that includes forms, budgets, processes, and recommendations.
- Serve as a fair and open clearinghouse for information, job opportunities, and professional training and vendor services to any member of Upstate SC ASTD.
- Board members will not use their position to have increased access to chapter members or use their influence to direct business to a specific organization or vendor.
- Facilitate programs and events for the benefit of Upstate SC ASTD members that provide meaningful experiences that are used as learning opportunities and not a venue to push products or services.
- Represent the chapter both professionally and ethically in all business functions and organizational activities.

Revised October 2012



## Vice President of Member Communications – Upstate SC ASTD Job Description

Serve as the newsletter editor and lead the committee that is responsible for creating content, designing, and emailing via Wild Apricot a newsletter to the membership on a regular basis. In addition, this VP is responsible for reporting on each chapter meeting and taking photos as appropriate to upload to the chapter website following each meeting. This includes co-managing the chapter's social media accounts on Facebook, LinkedIn, and Twitter as they relate to posting meeting reports and photos as a part of the chapter's Communications Plan to recruit new members. In addition, this VP would review special requests and opportunities from outside sources and determine if they should be distributed to the membership via the News Blog.

### Responsibilities:

- Serve a term of at least one calendar year.
- Recruit committee members as needed and appoint Director who would be the VP "trainee," next in line pending nomination and vote. Director would fill in for VP if VP can't make board meetings.
- Learn how to use Wild Apricot and develop a subject matter expertise on the Newsletter and News Blog functions, including setting up subscription feature.
- Create monthly or at least a quarterly newsletter in Wild Apricot containing chapter news and email to membership. Content may include:
  - Member spotlights
  - Chapter news
  - Meeting highlights – past and upcoming
  - Content provided by ASTD National website
- Know, understand and implement ASTD logo guidelines from National as well as for the chapter.
- Collaborate with VP of Event Promotions to establish and maintain a media list of all relevant business media in Upstate SC and Western NC. This should include all available and relevant business and community media contacts found not only in traditional media outlets but also in other organizations such as Swamp Fox, GSATC, and Greater Greenville Chamber of Commerce.
- Write and submit press release with chapter news to media list (excluding business calendar contacts) and with attention to varying media deadlines, including pitching feature articles ideas where opportunities exist:
  - Information on newsworthy activities as determined by the President and/or Board.
  - New board announcement to business media in January, including photo of president or group shot of board.
  - Interview with an incoming major national speaker.
  - Post meeting reports and photos, including Employee Learning Week activities.
  - Chapter awards such as Chapter of the Month, CORE compliance, and membership Superstar.
- Collaborate with VP of Event Promotions and VP of Technology in co-managing the chapter's social media accounts on Facebook, LinkedIn, and Twitter as they relate to reporting on all chapter events and newsworthy items.
- Collaborate with VP of Event Promotions in creating the chapter's Communications Plan.
- Collaborate with VP of Programs and VP of Technology to post meeting summaries to chapter website.
- 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.





#### Resources:

- Full administrator access to the chapter's Wild Apricot association management system.
- Assigned Rackspace email address: [communications@upstatesc.astd.org](mailto:communications@upstatesc.astd.org)
- ASTD Chapter Leader Community <http://old.astd.org/membership/ChapterLeadership/>
- ASTD Leader Connection Newsletter: <http://old.astd.org/membership/ChapterLeadership/Resources/LCN.htm>
- ASTD Marketing Resources:  
<http://old.astd.org/membership/ChapterLeadership/Resources/Chapter+Marketing+Resources.htm>
- ASTD Chapter Logo: <http://old.astd.org/membership/ChapterLeadership/Resources/ChapterLogos.htm>
- ASTD Free Content: <http://old.astd.org/membership/chapters/FreeWebContent>
- ASTD Toolkits: <http://old.astd.org/membership/ChapterLeadership/Resources/Toolkits/>

#### Board Member Expectations and Code of Conduct:

- Be an Upstate SC ASTD chapter member in good standing. It is preferable but not required that this board member also be a national ASTD member.
- Attend at least four chapter events annually (excludes Board of Director meetings).
- Attend and report on respective area at each Board of Director meeting held the 2<sup>nd</sup> Thursday of each month from 5:30 – 7:30 p.m. (complimentary light dinner included).
- Attend the annual Board of Director Planning Retreat to be held on a Saturday in January 2013 from 8 a.m. to 12 noon. Date will be finalized once new board is polled for availability.
- Become familiar with and abide by Upstate SC ASTD's by-laws, policies and procedures.
- *Proactively* execute the responsibilities for the role taken on the board. Be accountable for projects not only to the other board members but also to the chapter membership.
- Create a Transition Package for successor that includes forms, budgets, processes, and recommendations.
- Serve as a fair and open clearinghouse for information, job opportunities, and professional training and vendor services to any member of Upstate SC ASTD.
- Board members will not use their position to have increased access to chapter members or use their influence to direct business to a specific organization or vendor.
- Facilitate programs and events for the benefit of Upstate SC ASTD members that provide meaningful experiences that are used as learning opportunities and not a venue to push products or services.
- Represent the chapter both professionally and ethically in all business functions and organizational activities.

Revised October 2012





## Vice President of Technology – Upstate SC ASTD Job Description

Lead the technology committee/advisory board that is responsible for maintaining and further developing the chapter's website on Wild Apricot as well as being responsible for the Technology Special Interest Group (Tech SIG) programs. Set up the Event Registration Calendar in Wild Apricot for all Tech SIG events and upload the speaker details for each meeting for others' use in developing PR activities and email blasts. This VP also will oversee the website work done by other Board members who have administrator access as well as manage the board's Rackspace email system.

### Responsibilities:

- Serve a term of one calendar year.
- Recruit committee members/advisory board and appoint Director who would be the VP "trainee," next in line pending nomination and vote. Director would fill in for VP if VP can't make board meetings.
- Know, understand and adhere to ASTD logo guidelines at the National and chapter level.
- Learn how to use Wild Apricot and develop a subject matter expertise on the website section.
- Responsible for maintaining and further developing the chapter's website on Wild Apricot.
  - Ensure members, and members only, have access to members-only area.
  - Further develop the website to include new features and layout on an ongoing basis. Research ASTD National website for premium content to add to members-only area.
  - Supervise other Board members with website administrator access. Solve problems as they arise.
  - Collaborate with Director of Student Outreach to pursue student interns with website design skills, if needed.
- Responsible for managing and further developing as needed the Rackspace account that provides role-based email addresses to board members and the board member calendar.
- Make ongoing observations of chapter processes and research, propose, and implement technology-based solutions to provide continuous improvement.
- Collaborate with VP of Event Promotions and VP of Member Communications to co-manage the chapter's social media accounts on Facebook, LinkedIn, and Twitter.
- Be the Moderator for the chapter's LinkedIn Group page and actively pursue its development as a place for good discussion as well as a member recruitment tool. Collaborate with VP of Membership in pursuit of the latter.
- Responsible for any Technology Special Interest Group (Tech SIG) activities which provides a forum for ASTD members to share technology-related information and foster communications.
  - Maintain relationship with SimHub as venue for these meetings.
  - Schedule at least four Tech SIGs a year and coordinate dates with SimHub.
  - Locate speaker and arrange for speaker's needs. (Refer to speaker documentation used by VP of Programs.)
  - Collaborate with VP of Event Promotions as well as Member Communications to promote and publicize the events.
  - Collaborate with VP of Community Relations for any sponsorships opportunities.
  - Collaborate with Director of Hospitality for providing hospitality services for these events.
- Collaborate with VP of Programs to provide speaker for a technology-focused chapter meeting.
- 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.



#### Resources:

- Full administrator access to the chapter's Wild Apricot association management system.
- Assigned Rackspace email address: [technology@upstatesc.astd.org](mailto:technology@upstatesc.astd.org)
- ASTD Chapter Leader Community <http://old.astd.org/membership/ChapterLeadership/>
- ASTD Leader Connection Newsletter: <http://old.astd.org/membership/ChapterLeadership/Resources/LCN.htm>
- ASTD Toolkits: <http://old.astd.org/membership/ChapterLeadership/Resources/Toolkits/>

#### Board Member Expectations and Code of Conduct:

- Be an Upstate SC ASTD chapter member in good standing. It is preferable but not required that this board member also be a national ASTD member.
- Attend at least four chapter events annually (excludes Board of Director meetings).
- Attend and report on respective area at each Board of Director meeting held the 2<sup>nd</sup> Thursday of each month from 5:30 – 7:30 p.m. (complimentary light dinner included).
- Attend the annual Board of Director Planning Retreat to be held on a Saturday in January 2013 from 8 a.m. to 12 noon. Date will be finalized once new board is polled for availability.
- Become familiar with and abide by Upstate SC ASTD's by-laws, policies and procedures.
- *Proactively* execute the responsibilities for the role taken on the board. Be accountable for projects not only to the other board members but also to the chapter membership.
- Create a Transition Package for successor that includes forms, budgets, processes, and recommendations.
- Serve as a fair and open clearinghouse for information, job opportunities, and professional training and vendor services to any member of Upstate SC ASTD.
- Board members will not use their position to have increased access to chapter members or use their influence to direct business to a specific organization or vendor.
- Facilitate programs and events for the benefit of Upstate SC ASTD members that provide meaningful experiences that are used as learning opportunities and not a venue to push products or services.
- Represent the chapter both professionally and ethically in all business functions and organizational activities.

Revised October 2012