



ATD Greater Cleveland Board Position Descriptions

[President](#)

[Executive Vice President](#)

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ATD Greater Cleveland Board Position Descriptions

Position Title: President

Eligibility: Member of ATD Greater Cleveland for minimum of two years and served on at least two ATD committees or task forces.

Term of service: Two year term

Job Role: Serve as the Chief Executive Officer of the Chapter

Requirements:

- Active member of both National and local ATD on or before July 1st of each year
- Attend 80% of all board meetings (including via conference calls)
- Attend at least seven programs
- Deliver a budget
- Recruit, train and develop a board of directors

Duties:

- Preside over all board meetings
- Serve as ex-officio member of all board level committees
- Design and execute an annual board retreat
- Act as liaison with the National ATD office
- Represent the Chapter in communications with other professional organizations, the media, and the public
- Manage all paid positions
- Manage Webmaster position
- Manage the professional development of board members in the absence of the President Elect
- Provide guidance to board members
- Serve as initial liaison to external organizations
- Solicit and coordinate sponsorship
- Serve as liaison for partnerships with other organizations including other ATD chapters

Timelines:

- 1st of August deliver a budget
- Five business days prior to a board meeting distribute meeting agenda

Success Standards:

- Chapter meets National ATD CORE requirements
- Chapter finances are in order according to bylaws

ATD Greater Cleveland Board Position Descriptions

Position Title: Executive Vice President (President Elect)

Eligibility: Member of ATD Greater Cleveland for minimum of two years and served on at least two ATD committees or task forces

Term of service: One year term with succession option

Job Role: Serve as apprentice for the role of Chapter President

Requirements:

- Active member of both National and local ATD on or before July 1st of each year
- Attend 80% of all board meetings (including via conference calls)
- Attend at least seven programs
- Deliver a budget
- Monthly report to the President and board. Board report to include update on any and all award programs

Duties:

- Assist Chapter President as needed and requested
- Manage award committee
- Compile data for use in all award programs sponsored by National ATD as well as for all Chapter sponsored award programs
- Serve in the role of President in the absence of the President
- Manage the recruitment of board members
- Manage the professional development of board members
- Acts as chair of the nominating committee
- Design and executes an annual board retreat in the absence of the President
- Oversee board transition events
- Establish and ensure policy and procedure manual for the Chapter is current and distributed to the appropriate persons

Timelines:

- 1st of month board report
- 1st of August deliver a budget
- September board meeting outline scope and timeline for all award programs
- May board meeting present for a vote the slate of directors for the new year
- May Chapter meeting present for a vote the slate of directors for the new year

Success Standards:

- Proficient in execution of all operations of the Chapter
- Proficient in execution of National ATD CORE requirements

ATD Greater Cleveland Board Position Descriptions

Position Title: Immediate Past President

Eligibility: Past President

Term of service: Two year team

Job Role: Manages the business aspect of the Chapter operations, including recommending policies and procedures for more efficient use of Chapter resources

Requirements:

- Active member of both National and local ATD on or before July 1st of each year
- Attend 60% of all board meetings (including via conference calls)
- Attend at least five programs
- Deliver a budget

Duties:

- Trains and works with each and all board members in the exercise of their respective duties
- Manages recruitment, orientation and placement of volunteers
- Send letter of welcome to new volunteers which will include:
 - Description of committees
 - List of Board members and how to reach them
 - Program brochure
- Maintain a record of volunteers including:
 - Contact information
 - Task assignment
 - Area of interest
- Coordinate the annual recognition of Chapter volunteers
- Notify Board member(s) of unassigned volunteers
- In the absence of the President Elect, the Executive Director will assume the following responsibilities:
 - Manages the award committee in the absence of the President Elect
 - Compile data for use in all award programs sponsored by National ATD as well as for all Chapter sponsored award programs
 - Act as chair of the nominating committee
- Serve as Chapter historian
- Recruit and coordinate Sponsorships
- Act in the role of President in the absence of the President and President Elect
- Other duties as assigned and or requested by Chapter President

Timelines:

- 1st of every month board report
- 1st of August deliver a budget
- Within 7 days of notice contact potential volunteer
- Within 30 days conduct volunteer orientation after volunteer sign up



ATD Greater Cleveland Board Position Descriptions

Immediate Past President (cont'd.)

Success Standards:

- Volunteers contacted within stated timeline
- Volunteer orientation conducted within stated timeline
- Volunteer recognition at the last Chapter meeting of the year

ATD Greater Cleveland Board Position Descriptions

Position Title: Vice President of Administration

Eligibility: Member of ATD Greater Cleveland for minimum of one year and served on an ATD committee or task force

Term of service: One year term with one year succession option

Job Role: Responsible for ensuring effective record keeping and official correspondence from the chapter

Requirements:

- Active member of both National and local ATD on or before July 1st of each year
- Attend 60% of all board meetings (including via conference calls)
- Attend at least five professional development programs
- Deliver a budget
- Deliver a prior month's board meeting minutes for approval to the President and board

Duties:

- Establish and manage Chapter policies to ensure effective record keeping and official correspondence from the Chapter
- Records and maintains official record (minutes) of board meetings
- Records and maintains attendance record of board member for board meetings and attendance at professional development programs
- Maintain and distribute the board roster to appropriate staff
- Maintain and distribute the official Chapter calendar of board activities
- Maintain the policy and procedure in conjunction with the President or President Elect
- Creates business cards for the Chapter board
- Collects and tabulates official member ballots
- Manages the logistics of meetings for board, task force and focus group
- Develop annual report in conjunction with President
- Additional duties as assigned by President

Timelines:

- 1st of August deliver a budget
- Within seven days distribute board minutes with attachments and handouts to all board members
- September board meeting distribute business cards to board members
- 1st of each month distribute updated board calendar
- Within five business days of board meeting send out email confirming time/location

Success Standards:

- Minutes from board meetings and related events distributed within stated timeline
- Policies updated and current by each monthly board meeting
- Calendar current at all times

ATD Greater Cleveland Board Position Descriptions

Position Title: Vice President of Finance

Eligibility: Member of ATD Greater Cleveland for minimum of one year and served on an ATD committee or task force. Must be bondable and understand basic financial management.

Term of service: One year term with one year succession option

Job Role: Responsible for monitoring and managing Chapter finances

Requirements:

- Active member of both National and local ATD on or before July 1st of each year
- Attend 60% of all board meetings (including via conference calls)
- Attend at least five professional development programs
- Deliver a budget
- Deliver a monthly board report to the President and board. Board report should include:
 - Cost analysis of evening:
 - Identify portion paid by ATD
 - Identify portion paid by event sponsor
 - Identify portion paid by general sponsorship
 - Identify portion covered by in kind donation
 - Identify fees collected
 - Identify fees due
 - Report Chapter financial status
 - Fees due but not collected
- Recruit, train and develop a committee

Duties:

- Chairs audit committee: Auditing of books to include an annual audit by a Non-ATD resource
- Collect and deposit dues from new members
- Collect and deposit all funds related to Performance Development Programs (PDP)
- Deposit money from meetings, event, SIGS, workshops, dues, and sponsorship
- Ensure invoicing of “no shows” from chapter and or combined meetings, events, or workshops
- Maintains relationship with outside parties collaborating to deliver Train the Trainer, HPI certification and PDP regarding financials
- Pay bills in conjunction with office administrator
- Pursue collection of invoices from sponsorships
- File income tax in conjunction with office administrator as applicable
- Maintain and renew any applicable bonds in conjunction with Office Administrator
- Establishes and manages Chapter policies and procedures related to financial and investment matters
- Recruits, trains and supervises committee leaders who will take responsibility for collection of monies at any Chapter or Chapter sponsored event.
- Create a letter of commitment for collaborations, sponsorships and in-kind-donations.
- Update and file bond for board and general coverage in conjunction with office administrator
- Update and file insurance (fidelity) bond in conjunction with office administrator

ATD Greater Cleveland Board Position Descriptions

Vice President of Finance (cont'd.)

- Reconcile outstanding money for membership with National ATD
- Manage invoicing (All) in conjunction with office administrator
- Coordinate with Vice President of Membership to pursue delinquent invoices for no-shows

Timelines:

- 1st of month board report
- 1st of August deliver a budget
- Within seven days deposit any monies from an ATD event
- April 15th file appropriate taxes (or before)

Success Standards:

- Independent audit shows balanced books
- Deposit of funds/revenues/general monies is made within stated timeline
- Insurance and related bonds are in place and current

ATD Greater Cleveland Board Position Descriptions

Position Title: Vice President of Marketing & Communications

Eligibility: Member of ATD Greater Cleveland for minimum of one year and served on an ATD committee or task force. Must be bondable and understand basic financial management.

Term of service: One year term with one year succession option

Job Role: Responsible for the operation of Chapter (1) newsletter/e-newsletter, (2) event publicity, (3) oversees website (as publisher), (4) other related events to ensure effective and consistent Chapter information

Requirements:

- Active member of both National and local ATD on or before July 1st of each year
- Attend 60% of all board meetings (including via conference calls)
- Attend at least five programs
- Deliver a budget on or before August 1st of each year
- Deliver a monthly report to the President and Board by the 1st of each month. Board report should include:
 - List of media sources including dates and circulation numbers
 - Dates of email blasts
 - Deadlines for media releases
 - Needs from others including timelines
- Recruit, train and develop a committee

Duties:

- Establish and manage Chapter Marketing & Communications policies and procedures
- Coordinate marketing efforts with Vice President of Programs and Services
- Deliver a budget
- Create and distribute a Chapter news-letter or e-newsletter at least quarterly
- Recap regarding prior month's programming event, "What They Are Saying" (using small paragraph of 5 sentences or bullet points)
- Maintain and distribute ongoing member communications
- Develop fliers, post cards and brochures with information regarding programs, workshops, events and collaborations for distribution at all events not exclusive to ATD events
- Develop a marketing plan for the year
- Plan and execute marketing at all ATD events
- Create press releases for all media sources
- Create and maintain branding piece. "Who We Are, What We Do"
- Secure pictures from events

Timelines:

- 1st of month board report
- 1st of August deliver a budget
- 1st of September marketing plan to the board
- 1st of September communication plan to the board
- 15th of September flyer/postcard/brochure ready for distribution



ATD Greater Cleveland Board Position Descriptions

Vice President Marketing & Communications (cont'd.)

- 30th of September (or before) submit new board list to media
- 35 days in advance of an event submit marketing piece to Webmaster for website
- 35 days in advance of an event submit marketing piece to Office Administrator for evites or hard copy mail
- 35 days in advance of an event submit marketing piece and camera ready logo to collaborating organizations

Success Standards:

- Marketing information posted on Website in compliance with timeline
- Marketing information to Office Administrator in compliance with timeline
- Flyer/postcard/brochure ready for distribution in compliance with timeline

ATD Greater Cleveland Board Position Descriptions

Position Title: Vice President of Membership

Eligibility: Member of ATD Greater Cleveland for minimum of one year and served on an ATD committee or task force. Must be bondable and understand basic financial management.

Term of service: One year term with one year succession option

Job Role: Responsible for the operation of: 1) member greeting at professional programs, 2) new member orientation, 3) follow up on inquiries, non-renewals and 4) other related membership issues

Requirements:

- Active member of both National and local ATD on or before July 1st of each year
- Attend 60% of all board meetings (including via conference calls)
- Attend at least seven programs
- Deliver a budget
- Deliver a monthly board report to the President and board. Board report should include:
 - Number of and names of new (local only) members
 - Number of and names of new (National only) members
 - Number of and names of new (local & National) members
 - Number of renewals
 - Results of preceding professional program
- Recruit, train and develop committees for: 1) Greeting, 2) Orientation, 3) Retention

Duties:

- Establish and manage Chapter membership policies and procedures
- Create / coordinate distribution of new member packets in conjunction with Office Administrator
- Create potential new member packet and coordinate with Office Administrator distribution of potential new member packet
- Oversee greeters
- Oversee retention of members
- Plan and execute orientation sessions for new, prospective and National members
- Respond to questions regarding membership (both local and National) from the board, members at large, prospective members and the community at large
- Track, analyze, and report on membership data
- Maintains and oversees the annual publishing of the Chapter's Membership Directory
- Pursue to resolution any discrepancy between local and National regarding status of an individual membership
- Coordinate with Vice President of Marketing and Communications regarding information for branding piece related to membership
- Coordinate with Vice President of Programs and Services to have membership applications at all ATD events and ATD collaborations
- Coordinate with Webmaster to ensure a current membership application is maintained on the website
- Coordinate with Webmaster to post names of new members on the website
- Coordinate, as needed, with Webmaster regarding membership information for members only section of the website
- Conduct annual membership drive

ATD Greater Cleveland Board Position Descriptions

Vice President of Membership (cont'd.)

Timelines:

- 1st of month board report
- 1st of August deliver a budget
- 1st of August membership application information to Vice President of Marketing and Communications for placement in flyer/post card/brochure
- 1st board meeting of September distribute 10 member applications to board members
- 35 days in advance of an event submit to Webmaster for website any member ship incentives/contests

Success Standards:

- Retain level of current membership as established in the annual strategic plan
- Conversion of National only members to add local membership as established in the annual strategic plan
- Annual increase in membership level as established by the annual strategic plan
- Host a minimum of two (2) member orientations a year

ATD Greater Cleveland Board Position Descriptions

Position Title: Vice President of Programs & Services

Eligibility: Member of ATD Greater Cleveland for minimum of one year and served on an ATD committee or task force. Must be bondable and understand basic financial management.

Term of service: One year term with one year succession option

Job Role: Responsible for the operation of: of (1) monthly professional development programs, (2) special interest groups (SIGS) in appropriate areas, (3) Train the Trainer programs and (4) Evaluation committee, (5) Fun committee, (6) Planning committee, (7) any other meeting or event type of service for the Chapter membership

Requirements:

- Active member of both National and local ATD on or before July 1st of each year
- Attend 60% of all board meetings (including via conference calls)
- Attend at least seven programs
- Deliver a budget
- Deliver a monthly board report to the President and board. Board report should include:
 - Date/location of next program
 - Tally of attendees from previous month's program. Tally should include:
 - Number of members
 - Number of non-members (breakout number from other ATD Chapters)
 - Number representing program sponsor or speaker
 - Update of potential collaborations
 - Summary of prior month's program evaluations
- Recruit, train and develop committees for: 1) program planning committee, 2) fun committee and 3) evaluation committee

Duties:

- Establish and manage Chapter programs and services policies and procedures to ensure a high quality and appropriate variety of programs and services are available to the membership
- When offered, plan and execute Train-the-Trainer in collaboration with an outside agency by the executive committee
- Respond to questions regarding programs and services, general or specific
- Plan and execute monthly professional development programs
- Plan and execute workshops
- Track, analyze, and report on program data based on event evaluations
- Create, track, analyze, and report on annual survey to members and non-members
- Coordinate combined programs with other recognized organizations
- Provide information to Vice President of Marketing and Communications for write up of program / services release for media, internal ATD communication, communications through other organizations and website
- Distribute at each program a program evaluation
- Ensure collection and dissemination of evaluation results for each program
- Coordinate deliver of ice breakers at each program

NOTE: All collaborative deals with other organizations must have Executive Committee

ATD Greater Cleveland Board Position Descriptions

Vice President of Programs & Services (cont'd.)

Timelines:

- 1st of month board report
- 1st of August deliver a budget
- May board meeting present for approval the first six months of professional program / services (September through January)
- 1st of August submit information to Vice President of Marketing and Communication summary information for first six months of professional development programs (September through January)
- November board meeting present to President and board for approval the programs /services for the second half of the year (February through June)
- 1st of December submit information to Vice President of Marketing and Communication summary information for second six months of professional development programs (February through June)
- 1st of October committees in place
- 45 days in advance of an event submit to Vice President of Marketing and Communications all event details and program overview
- Recognized: Approval must be obtained from the President of the Chapter before formal agreement is made with other organizations
- Ensure thank you gift for event speaker is available for presentation at the conclusion of the event
- Within 15 business days of a program and/or event generate thank you to speaker and host (if applicable)

Success Standards:

- All programs and related events will be at a minimum revenue neutral
- Perform within approved budget
- Generate an annual survey to membership
- Deliver a board report each active month of board calendar