**Chapter Leader Position Description and Resources:** President Elect

**The purpose** of this document is to provide guidance and resources for chapter leadership roles.

**How to use this document:** Customize this document to fit your chapter role.

**Position Description:**

The president elect assists the chapter president in performance of chapter management duties, automatically succeeding to president. They participate in the recruitment of board members to lead the chapter in the succeeding year.

**Time Commitment:**

**Term:** Three Years:

* Year 1 – President Elect
* Year 2 – President
* Year 3 – Immediate Past President

**Estimated Time Requirements per month:**

* Attend board meetings: 2 hours plus travel time
* Assist president, learn chapter operations, develop board for coming year: 10-15 hours
* Attend monthly chapter meetings: 2 hours
* Communicate with administrative office and other board members about routine issues: 2-4 hours

**Responsibilities:**

 **Chapter Affiliation Requirements (CARE)**

* Oversees the yearly CARE reporting requirement and functions as the main point of contact for ATD on all CARE-related communications

**Supports President**

* Assumes duties of president when they are absent from board meetings or chapter meetings
* Assist the president with chapter organization and management, clarify board/committee responsibilities and encourage the best use of chapter resources
* Oversee sound financial status of chapter by monitoring monthly budget reports
* Establish productive relationships with ATD affiliates and chapter member companies
* Support onboarding of new board members

**Succession Planning**

* Lead succession planning to include recruiting new board members, managing the chapter's succession process, and chairing the nominating committee
* Succeeds to president upon expiration of president's term or upon resignation, incapacity, or death of president
* Assume duties of president when president is absent from board meetings or chapter meetings/functions

**Membership**

* Monitor/report results of needs assessments and satisfaction surveys and conveys member suggestions to board and membership. Uses results to support strategic planning and goal-setting for succeeding year
* Lead the chapter's vision, mission, and direction planning process at annual transition meeting, and is prepared to communicate and gain chapter member commitment

**Chapter Recognition**

* Lead the chapter awards committee in identifying candidates for local and national recognition, assuring proper award nomination documentation is submitted.

**Board Role**

* Attend and participate in monthly board meetings, chapter meetings, ATD International Conference & Exposition, and ATD Chapter Leaders Conference (ALC)
* Participate in other chapter events, committee meetings and conferences as available
* Represents chapter professionally and ethically in all business functions/organizational activities
* Participates in the development and implementation of short-term and long-term strategic planning for the chapter

**Skills:**

* Member of ATD and chapter
* Effective verbal communication, leadership, diplomacy, personal interaction, problem-solving and meeting management
* Ability to lead a committee, delegate tasks, and monitor progress
* Ability to build, motivate, and lead a team of volunteers
* Ability to plan, organize, and evaluate chapter activities
* Demonstrated experience in budget design and accountability desired
* Demonstrated ability to manage projects
* Time available to fully participate in chapter and board meetings, and represent the chapter regionally and nationally

**Resources:**

**Review the following on CLC:**

[Board Development Resources](https://www.td.org/chapters/clc/board-development)

[Past President Engagement](https://www.td.org/chapter-leader-community-clc/sharing-our-success-sos/past-president-engagement)

[Chapter Leader Onboarding Checklist](https://d22bbllmj4tvv8.cloudfront.net/0c/34/9c0e1319426d91ab2d18ff9fd0d0/chapter-leader-onboarding-checklist.pdf)

[Chapter Services Team](https://www.td.org/chapters/clc/chapter-services-team)/[NAC](https://www.td.org/chapters/clc/national-advisors-for-chapters)

[CLC Board Development Overview](https://www.td.org/chapters/board-development-overview)

[ATD Partnerships](https://www.td.org/chapters/clc/atd-partnerships)

[Maximizing Membership video](https://players.brightcove.net/4684385851001/default_default/index.html?videoId=6257113078001)

[Branding Materials](https://www.td.org/chapters/clc/marketing-and-branding-materials)

[Social media content](https://www.td.org/chapters/clc/social-media)

**Sharing Our Success (**[**SOS**](file:///C%3A%5CUsers%5Cshelbdm%5Ctd.org%5Csos)**):**

[SOS Board of Directors Page](https://www.td.org/board-of-directors-sos)

[SOS Board Governance Page](https://www.td.org/chapter-leader-community-clc/browse-all-sharing-our-success-sos-stories/governance)

**Review Board Roles (**[**Position Descriptions**](https://www.td.org/chapters/clc/board-development)**)**

Every board looks different. Review roles to learn more about the responsibilities for your chapter leadership.

President

Past President

Finance/Treasurer

Programs

Administration

Membership

Marketing/Communications

Technology

Others

**Chapter Incentive Program**

[Overview](https://www.td.org/chapters/clc/chip)

[Toolkit](https://d22bbllmj4tvv8.cloudfront.net/86/62/59d1d89f408f8a658a74dcdb3810/chip-toolkit-2021.pdf)

**CARE**

[Home](https://www.td.org/chapters/clc/care)

[Quick List](https://d22bbllmj4tvv8.cloudfront.net/9d/45/7a0d37f144f7b52a62831cd9337f/2022-care-quick-list.pdf)

[Chapter Operating Plan](https://d22bbllmj4tvv8.cloudfront.net/1e/5c/0f6404e848d5bfa6377e85609570/2023-chapter-operating-plan-template.docx)

**ATD Micro Courses**

Your role requires leadership skills and ATD has many resources for your professional development.

[Collaborative Leadership](https://www.td.org/education-courses/atd-elements/overview-of-collaborative-leadership)

[Leadership Competencies](https://www.td.org/education-courses/atd-elements/leadership-competencies)

[Conflict Resolution](https://www.td.org/education-courses/atd-elements/conflict-resolution-for-workplace-teams)

**TD Magazine Articles**

[Volunteering Provides a Value-Added Career Boost](https://www.td.org/magazines/td-magazine/volunteering-provides-a-value-added-career-boost)

**ATD Resources:**

[Chapter Relations Manager (CRM)](https://www.td.org/chapters/clc/chapter-services-team)

 [National Advisors for Chapters (NAC)](https://www.td.org/chapters/clc/national-advisors-for-chapters)

 [Chapter Affiliation Requirements (CARE)](https://www.td.org/chapters/clc/care)

 [Sharing Our Success (SOS)](https://www.td.org/chapters/clc/sos)

 [Chapter Leader Community (CLC)](https://www.td.org/chapters/clc/sos)

 [Leadership Connection Newsletter (LCN)](https://www.td.org/chapters/clc/lcn)

 [Toolkits](https://www.td.org/chapters/clc/toolkits)

[Chapter Leader Webcasts](https://www.td.org/chapters/clc/chapter-webcasts)