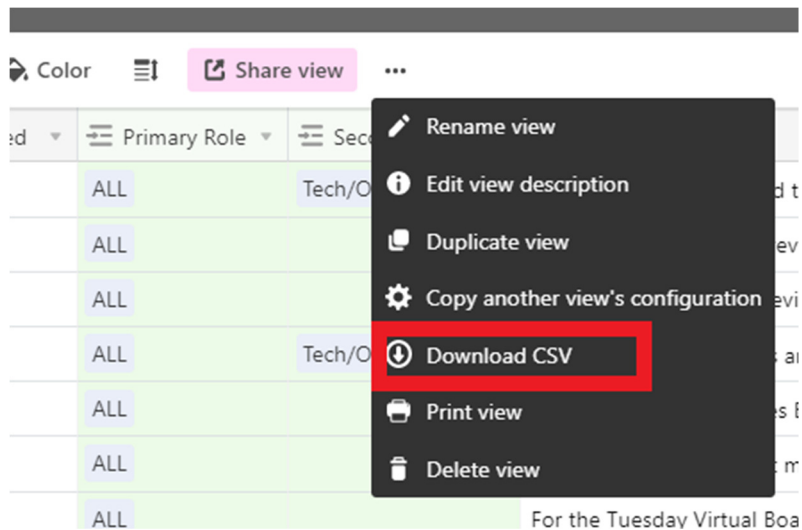


Screenshot of All Responsibilities Roadmap (Links to SOPs are attached where needed)

	Procedure	Primary Role	Secondary Role	Procedure Summary	CARE Task	CARE Category	Recurrence
1	Update Website pages	Tech/Ops	Mar/Comm Members	Tech Ops is in charge of the web pages and i...	No		On-going
2	Provide Support to Board for Applications Used	Tech/Ops	Past President Preside	Tech Ops is involved in the onboarding of bo...	No		On-going
3	Maintain a current website with up-to-date inf...	Tech/Ops	Mar/Comm	As part of CARE requirements, the website m...	Yes	Communication	On-going
4	Suggest updates to tools used or new ones	Tech/Ops	President	Changes to operating procedures for our too...	No		On-going
5	Provide Basic Training for Board Applications	Tech/Ops	Prior Role Owner / Pres		No		On-going
6	Create new volunteer/board member accounts	Tech/Ops	Board Admin	When new volunteers need access to the sys...	No		On-going
7	Reports Event Survey results to Board	Programs	Membership	After an event occurs it is Programs responsi...	No		Monthly
8	Provide at least six programs per year for mem...	Programs	President	Per CARE requirements, the chapter must pr...	Yes	Programming	On-going
9	Elect New Board Members	President	Board Admin	Election of new board members should occu...	No		Annual
10	Ensure board maintains Joint Membership	President	Board Admin	Per CARE requirements, all Board Members ...	Yes	Board of Directors Govern	On-going
11	Obtain ATD Global support at least once per y...	President	Mar/Comm	Per CARE requirements, board members hol...	Yes	Communication	Annual
12	Conduct Annual Members' Survey	Membership	Tech/Ops	Per CARE requirements, the chapter assesses...	Yes	Membership	Annual
13	Conduct 10 joint membership activities	Membership	ALL	Per CARE requirements, the chapter must pe...	Yes	Membership	Annual

Chapters that have their own tool to use this content can export it using the menu above.



Screenshot of Responsibilities filtered view to one role, Finance. Completed column can be used to indicate if the Procedure is Complete or could be exported as a list for new board member to indicate they have reviewed all content. The multiple views here are attached to a separate Onboarding Checklist for overall Chapter Onboarding.

A2ATD Board Policies, Roles and Responsibili... HELP ?

Chapter Policies Roles and Responsibilities Board Roles SHARE

VIEWS Finance Responsibilities Hide fields 3 filters Group Sort Color Share view

Procedure	Completed	Primary Role	Secondary R...	Procedure Summary	CARE Task	Recurrence	CARE Category
1 Update Links on Website		ALL	Tech/Ops	Any role may have a need to update a link o...	No	On-going	
2 Contribute to Annual Operating Plan		ALL		Each board Role should review, update, and ...	Yes	Annual	
3 Review Board Job Descriptions		ALL		Each board role should review their job descr...	Yes	Annual	
4 Recruits and Trains Successor		ALL	Tech/Ops President	Although the board roles are 2 year terms, o...	No	Annual	
5 Response Times to Email, etc.		ALL		Response Time Guidelines Email - 24 to 48 h...	No	On-going	
6 Board Member Attendance per By-Laws		ALL		Board Members shall not miss three consecu...	No	On-going	
7 Provides update for role in Board Meeting Age...		ALL		For the Tuesday Virtual Board meeting, each ...	No	Monthly	
8 Maintain Power Membership with A2ATD and ...		ALL		Every board member is responsible per requi...	Yes	Annual	
9 Submit 990 postcard tax filing		Finance	President	Submit proof of filing to ATD here: https://fo...	Yes	Annual	
10 Purchase Gift Cards for Speakers		Finance	Programs	Currently each speaker at our monthly event...	No	On-going	
11 Pay and setup ATD Power Memberships purch...		Finance	Membership	If a Power Membership is purchased from A2...	No	On-going	
12 Create and submit 1099s for speakers paid mo...		Finance	President	Each calendar year, any speaker paid more t...	No		
13 Order Name Badges for Board		Board Admin	Finance	Name badges are ordered for all new board ...	No	On-going	
14 Prepare annual operating budget and make av...		Finance	President	As part of CARE requirements, the chapter b...	Yes	Annual	Finance
15 Submit yearly balance sheet to ATD Global		Finance	President	As part of CARE requirements, the chapter wi...	Yes	Annual	Finance
16 Submit yearly profit and loss statement to ATD...		Finance	President	As part of CARE requirements, the chapter wi...	Yes	Annual	Finance
17 Annual financial review is conducted (internal ...		Finance	President	As part of CARE requirements, the chapter b...	Yes		Finance