

President-Elect Role Description

Position Summary:

The President-Elect acts for the President in the President's absence. This position assists the President in the performance of Chapter management duties such as assisting with the completion of Chapter Affiliation Requirements (CARE), selecting and leading members of a Nominating committee to review candidates for the Board of Directors, and selecting a Bylaws committee to review the chapter's Bylaws (every two years). The President-Elect automatically succeeds to the President; therefore this position serves as preparation to fulfill responsibilities related to the presidency.

The President-Elect will lead an ad hoc Nominating committee (annually) and/or a Bylaws committee (every two years).

Time Commitment:

Term: 1 year

Estimated Time Requirements for planning and attending meetings and events

- Attending virtual board meetings: 1.30 hours monthly
- Attending ad hoc committee meetings: 6 hours annually
- Creating and reviewing standard operating procedures: 1 hour monthly
- Attending chapter learning events: 2.30 hours plus travel time
- Attending geographic events/special interest events: 2 hours quarterly
- Community engagement activities: 2 hours annually

Estimated Time Requirements for training

- Transitional training with outgoing President: 3 hours
- Attendance at annual board summit: 4 hours plus travel time
- Attendance at ATD Chapter Leaders Conference (ALC) (*based on chapter funding + travel time*): 5 hours

**The time commitment is a cumulative approximation over a period of several months and includes the variation of support needed for each task. Board members may or may not exceed this threshold.*

PRINCIPAL DUTIES & RESPONSIBILITIES

- Prepare to succeed the President upon expiration of the President's term upon resignation, incapacity or death of the President.
- Shadow the President in preparation for the transfer of duties.
- Assume duties of the presidency when the acting President is absent from Board meetings, chapter meetings, and/or other events, functions, etc.
- Assist President with chapter organization and management, assist with Board and/or committee responsibilities as needed and encourage best uses of chapter resources.

- Chair the Nominating committee to lead succession planning, including recruiting new Board members, managing the process, and overseeing the Chapter election process to be concluded within timeframe as stated in the Bylaws.
- Recruit and vet active members to serve on the Nominating committee in accordance with the requirements stated in the Bylaws. (Nominations committee will consist of the President-Elect, current President, three general members all in good standing who are not serving on any other committee in the chapter). Candidates for board roles will be placed on the ballot annually.
- Recruit and vet active members to serve on the Bylaws committee, who will review the Bylaws every two years in accordance with the requirements as stated in the Bylaws. (Bylaws committee must consist of the President-Elect, one Past President, three general members all in good standing who are not serving on any other committee in the chapter).
- Plan and facilitate the annual Strategic Planning meeting and transition to the new Board.
- Serve on the Financial Review Committee to conduct a financial review at least annually and report findings to the Board which will also be published for Chapter membership.
- Send a roster of leaders and Chapter contact information to ATD National for the upcoming year. Work with the President to ensure adherence to CARE.
- Update job descriptions for all Board positions and for other Chapter-related positions.
- Develop additional job descriptions as needed and get final approval from the Board.
- Provide support to all Board members as well as to standing Board committees and ad hoc special interest groups.
- Appoint replacements to the Board when positions are left vacant.
- Call for and preside over Special Meetings of the Chapter as needed.
- Stay abreast of changes to state laws affecting the Chapter and its governance.
- Serve as Past-President for a term of one year directly after completing presidency.
- Serve in position for a term of one year with possibility of re-election for an additional term.
Note: President-Elect and Past President's positions are extended automatically in the event that the current serving President is re-elected for an additional term.
- Collaborate with the VP of Membership to collect and publish Member of the Month, reviewing and updating bio for grammar and length when necessary.
- Assist and maintain Chapter Affiliation requirements.
- Consult with the conference planning committee when necessary.
- Create, review and update Standard Operating Procedures (SOPs) related to role.
- Maintain membership in local and national ATD organizations.
- Virtually attend and report on committee activities at most Board meetings.
- Participate in the annual in-person Board summit.
- Manage a fiscally responsible budget.
- Plan educational events, including sharing topics and speaker ideas.
- Collaborate with the Vice-President of Communications to advertise and promote active members to serve on the nominating committee (annually) and Bylaws committee (every two years) on the website and social media.
- Collaborate with the Vice-President of Finance to secure appropriate funding for travel, events and reconcile expenses in a timely manner.
- Attend National Advisors for Chapters (NAC) virtual calls when available.
- Attend quarterly orientation sessions when available.
- Repost and advertise chapter events on social media.

A successful President-Elect will:

- Possess strong assertiveness and collaboration skills.
- Present a slate of candidates for board roles to the Nominating committee (preferably by November).
- Present a slate of candidates to the general membership body after the Nominating committee reviews the slate of candidates and conduct board elections before December 31st or per the Bylaws.
- Work with the Bylaws committee to review the existing Bylaws and propose amendments if and when necessary (every two years). Present changes to the Board and if approved, submit
- Create electronic ballot and vet responses using survey tools such as QuestionPro.
- Present a roster of board members to ATD National before December 31st annually.
- Recruit a minimum of five active members to serve on the Bylaws Committee (consisting of President-Elect, one Past President, three members of the general Body).
- Recruit a minimum of five active members to serve on the Nominating Committee (consisting of the current President, President-Elect, three members of the general Body).
- Be willing to travel, as the role involves visiting geographically dispersed areas within South Carolina to host and participate in events.
- Implement marketing strategies that result in increased participation in the number of members being willing to serve in board positions.
- Be an effective leader, as this individual will oversee a team of volunteers.
- Aim to have a diverse group of volunteers serving on the Nominating and Bylaws committees.
- Ensure the timely dissemination of event information to the Communications team 30 days prior to the event.
- Take proactive action to review and update web pages to ensure they allow members to be kept informed of membership opportunities.
- Provide adept communication, involving interaction with various key stakeholders by:
 - Collaborating with multiple potential members, the Board and existing members.
- Ensure that event venues across the state offer sufficient parking and align with diversity, accessibility and compliance initiatives when hosting an in-person membership event.
- Demonstrate creativity in advertising strategies, thinking beyond conventional methods.

HELPFUL SKILLS

Strong communication skills | Negotiation skills | Assertiveness | Excellent organization skills and leadership ability | Marketing Strategies | Detail-oriented | Familiarity with technology, including virtual platforms such as WebEx and Survey platforms such as QuestionPro | Decision-making | Familiarity with Robert's Rule of Order | Reporting | Collaboration | Delegation | Change Management | Recruitment

MEETING EXPECTATIONS



The President-Elect is expected to attend all Board meetings, an annual board summit, one ALC (provided funding is available), a minimum of: four chapter learning events, two special interest group events, two quarterly orientation sessions, one NAC call, and one community-based event.

Resources and References

- [Board Member - Interest Statement for Consecutive Years of Service_ New Position.docx](#)
- [Board Member - Interest Statement for Same Position.docx](#)
- [Nominations Committee Request Template](#)
- [Presidents Elect: What You Need to Know About Your Upcoming Presidential Term | ATD](#)
- <https://www.td.org/board-recruitment-strategy>
- [QuestionPro](#)
- [Embedding Diversity into Chapter Operations](#)
- [Chapter Affiliation Requirements \(CARE\)](#)

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