



IA Chapter Board Function and Job Descriptions **(Updated, June 2021)**

The Insights Association Chapter Board functions as a steering committee that oversees and directs the affairs and activities of the Chapter. Every Board member should understand and support the Chapter Bylaws.

The Time Commitments noted for each position are guidelines and may vary based on the Chapter and its initiatives.

Maintaining a volunteer team to assist the Chapter Board with its duties is encouraged and will help the Board Members to meet their commitments, as well as offer a pathway for Chapter Members to engage with the Board and highlight the opportunities for leadership roles within the Chapter.

Basic Board Structure & Terms

Board Position	Term
President	1 year
President-Elect	1 year Plus 1 year as President
Secretary	2 years Can be re-elected for additional term
Treasurer	2 years Can be re-elected for additional term
Treasurer-Elect	1 year Plus 2 years as a Treasurer Position is filled in 2 nd year of Treasurer term
Director of Membership	2 years Can be re-elected for additional term
Director of Events	2 years Can be re-elected for additional term
Director of Regional Member Engagement *	2 years Can be re-elected for additional term
Director of Partnerships	2 years Can be re-elected for additional term
Director of Communications	2 years Can be re-elected for additional term
Director of Inclusion & Diversity	2 years Can be re-elected for additional term
Director of New Professionals	2 years Can be re-elected for additional term

Metro Support Teams	Term
Metro Director	Typically a 1 year cycle, but can be extended
Assistant Metro Director	Typically a 1 year cycle, but can be extended

**** Each Board may choose to place more than one Director of Regional Engagement, based on the number of Metro areas in the Chapter's footprint.***

It is recommended that each Director of Regional Engagement should manage no more than 3-5 Metro areas, dependent on the size/reach of those areas.

President

Term: One (1) year

Eligibility: Any member in good standing is eligible. It is preferable that the member has served on the Board of Directors previously.

Responsibilities: The President is a chairperson of the Board of Directors and Executive Committee.

The President's leadership responsibilities are to:

- Coordinate and direct all Chapter activities toward achieving objectives in support of the Chapter's strategic plan and Partnership Agreement requirements
- Supervise others as they work toward Chapter goals
- Act as official spokesperson of the Chapter at functions and to related organizations
- Support and uphold policies adopted by the Board
- Keep the Chapter financially sound, adhere to the budget, and follow financial procedures
- Report to members on Chapter operations and Board actions through speeches, letters, email or publications (newsletter) and at the Annual Meeting
- Preside at meetings of the Board, Executive Committee and membership
- Communicate with members and make suggestions to promote engagement with the Chapter
- Help identify future leaders
- Serve as ex-officio member with right to vote on all committees except the Nominating Committee
- Serve as an advisor to the President-Elect
- Along with the President-Elect, plan and execute Board transition
- Consult with the Regional Advisory Council

The President's administrative duties are to:

- Schedule and prepare agendas for Board meetings
- Conduct the Officer and Board orientation meeting, held annually

Time Commitment: 3-5 hours per week (average)

- Minimum of 4 Board of Director meetings (recommended monthly)
- Attendance at all Chapter meetings, Regional Conference (with travel stipend from Chapter) and Chapter events in the Metro area where the President is based
- Attendance at in-person (1x per year with travel stipend) and virtual Leadership training sessions conducted by HQ
- Member of the cross-regional Executive Officer Committee

Skills Required:

- Leadership/Vision
- Management
- Organization
- Team building
- Time management
- Conflict management
- Effective verbal and written communication
- Ability to motivate people to perform at high levels
- Ability to delegate effectively

President-Elect

Term: One (1) year with the expectation of continuing on as President (two years total commitment).

Eligibility: Any member in good standing is eligible. It is preferable that the member has served on the Board of Directors.

Responsibilities: The President-Elect shall preside at meetings of the Board of Directors and Executive Committee in the absence of the President. This individual will serve as Chairperson of the Nominating Committee. The President-Elect is a member of the Executive Committee.

The President-Elect shall:

- Become familiar with the work of the committees under his/her jurisdiction. Ensure committee reports are filed in a timely fashion. Assist committee chairs and members in making plans and goals and supervise and coordinate committee work.
- Be familiar with the requirements as outlined in the Partnership Agreement and the objectives of the Chapter's strategic plan
- Be knowledgeable about Chapter activities in order to act as interim President or represent the President when necessary
- Review Chapter Bylaws and Strategic Plan
- Help identify future leaders
- Serve as an advisor to any committee authorized by the Board of Directors
- Assume the duties of the President in case of the President's resignation, absence or inability to act
- Consult with the Regional Alumni Council
- Perform any other duties assigned by the President or the Board of Directors

Time Commitment: 3-5 hours per week (average)

- Minimum of 4 Board of Director meetings (recommended monthly)
- Attendance at all Chapter meetings, Regional Conference (with travel stipend from Chapter) and Chapter events in the Metro area where the President-Elect is based.
- Attendance at in-person (1x per year with travel stipend) and virtual Leadership training sessions conducted by HQ.
- Member of the cross-regional Executive Officer Committee

Skills Required:

- Leadership/Vision
- Management
- Organization
- Team building
- Time management
- Conflict management
- Effective verbal and written communication
- Ability to motivate people to perform at high level
- Ability to delegate effectively

Secretary

Term: Two (2) years, or until a successor is elected and qualified.

Eligibility: Any member in good standing is eligible. It is preferable that the member has served on the Board of Directors previously.

Responsibilities: The Secretary shall preside at meetings of the Board of Directors in the absence of other officers and shall serve as a member of the Executive Committee.

The Secretary's responsibilities are to:

- Be familiar with the requirements as outlined in the Partnership Agreement and the objectives of the Chapter's strategic plan
- Record minutes of all meetings of the Board of Directors, Executive Committee and General Membership and submit to the Board for approval
- In the event a Secretary is unable to attend a meeting, the Secretary shall secure another Board Member to record meeting minutes
- Ensure approved copies of the minutes of each meeting are provided to the President, other Officers, Directors and HQ
- Prepare and distribute information packets at each Board meeting if applicable
- Serve all notices of meetings of the Board of Directors and of the Chapter
- Responsible for electronic archival of all Board-pertinent information (non-financial)
- Maintain electronic archival of important correspondence
- Serve as an advisor to any committee authorized by the Board of Directors, if applicable to your Chapter
- Perform any other duties assigned by the President or the Board of Directors

Time Commitment: 1-2 hours per week

- Minimum of 4 Board of Director meetings (recommended monthly)
- Attendance at all Chapter meetings, Regional Conference (with travel stipend from Chapter) and Chapter events in the Metro area where the Secretary is based
- Attendance at in-person (1x per year with travel stipend) and virtual Leadership training sessions conducted by HQ
- Member of the cross-regional Executive Officer Committee

Skills Required:

- Knowledge of Chapter operations
- Timeliness
- Organization
- Detail-oriented
- Effective written communication
- Ability to accurately summarize meeting information/content in a non-biased way

Treasurer

Term: Two (2) years, or until a successor is elected and qualified.

Eligibility: Any member in good standing is eligible. It is preferable that the member has served on the Board of Directors previously.

Responsibilities: The Treasurer oversees the Chapter's funds and financial records and serves as a member of the Executive Committee.

It is the Treasurer's responsibility to:

- Be familiar with the objectives of the Chapter's strategic plan and Partnership Agreement policies with special focus on the financial requirements
- Collect all funds and properly safeguard those funds
- Supervise receipt and disbursement of Chapter funds
- Maintain a timely system of paying all authorized invoices
- Establish and maintain proper accounting procedures for the handling of funds
- Prepare an annual operating budget and ensure compliance, once approved by the Board of Directors
- Establish budgeting processes for the Metro areas, to be communicated with the Director of Regional Member Engagement
- Serve as an advisor to the Director of Regional Member Engagement, Metro Directors and Assistant Metro Directors for local event financial management
- Report on the financial condition of the Chapter at all meetings of the Board of Directors and at other times when called upon by the President or HQ
- Ensure bank reconciliation is completed monthly and approved by the President
- Ensure an annual accounting review is performed by a third party (e.g. Accountant)
- Prepare annual financial reports for the Membership
- Submit annual financial deliverables to HQ per published calendar
- Comply with all governmental tax regulations including the filing of Chapter tax reports to HQ, the IRS and the Chapter's state of incorporation (the latter if required)
- Responsible for keeping funds in such banks, trust companies and/or investments as are approved by the Executive Committee
- Ensure the Chapter incorporation is maintained according to state requirements
- Maintain all permanent financial records
- Perform any other duties assigned by the President or the Board of Directors

Time Commitment: 2-3 hours per week

- Minimum of 4 Board of Director meetings (recommended monthly)
- Attendance at all Chapter meetings, Regional Conference (with travel stipend from Chapter) and Chapter events in the Metro area where the Treasurer is based
- Attendance at virtual Leadership training sessions conducted by HQ
- Member of the cross-regional Treasurer Committee

Skills Required:

- Knowledge of Chapter operations
- Familiarity with financial operations, budget and expense analysis
- Detail-oriented
- Organized
- Effective verbal and written communication
- Ability to motivate people to perform at high level
- Ability to delegate effectively
- Leadership

Treasurer-Elect

Term: One year with the expectation of continuing on as Treasurer (three years total commitment).

Eligibility: Any member in good standing is eligible.

Responsibilities: Treasurer-Elect's responsibilities shall be those which the Treasurer, President or the Board of Directors shall assign. The Treasurer-Elect shall assume the duties of the Treasurer in case of the Treasurer's resignation, absence, or inability to act.

Treasurer-Elect shall:

- Train alongside the Treasurer in regard to all Chapter financial and legal responsibilities
- Actively support the Chapter's financial objectives and vote on the disbursement of funds
- Develop and review committee responsibilities as assigned
- Provide financial guidance to committee chairs and be available for consultation
- Serve as an advisor to the Director of Regional Member Engagement, Metro Directors and Assistant Metro Directors for local event financial management
- Attend scheduled Board meetings and be prepared to discuss agenda items
- Be familiar with the objectives of the Chapter's strategic plan and Partnership Agreement policies, with special focus on the financial requirements
- Act as liaison with specific Board committees
- Perform any other duties assigned by the President or the Board of Directors

Time Commitment: 1-2 hours per week

- Minimum of 4 Board of Director meetings (recommended monthly)
- Attendance at all Chapter meetings, Regional Conference (with travel stipend from Chapter) and Chapter events in the Metro area where the Treasurer-Elect is based
- Attendance at virtual Leadership training sessions conducted by HQ
- Member of the cross-regional Treasurer Committee

Skills Required:

- Knowledge of Chapter operations
- Familiarity with financial operations, budget and expense analysis is preferred but not required
- Detail-oriented
- Organized
- Oral & written communication
- Ability to motivate people to perform at high level
- Ability to delegate effectively
- Leadership

Director of Membership (Director-at Large)

Term: Two (2) years but can be re-elected for additional two-year terms as Bylaws permit.

Eligibility: Any member in good standing is eligible.

General Responsibilities: Chapter Directors-at-Large shall provide insight and suggestions on policies brought before the Board.

Directors-at-Large shall:

- Provide direction of Chapter affairs, its committees and publications
- Determine the Chapter's policies and/or changes therein
- Actively pursue the Chapter's objectives and vote on the disbursement of funds
- Provide a communication link between the Chapter membership and the Board
- Approve goals and objectives, which support the execution of the Chapter's strategic plan
- Develop and review assigned committee responsibilities
- Provide expertise to committee chairs and be available for consultation
- Attend scheduled Board meetings and be prepared to discuss agenda items
- Be familiar with the Partnership Agreement and Chapter policies and the Chapter strategic plan
- Distribute assigned committee meeting reports to the Board of Directors
- Perform any other duties assigned by the President or the Board of Directors

Component Area Responsibilities:

The Board member charged with Membership plays a critical role in the success of the Association. Increased membership and member satisfaction are the driving force of the Insights Association.

This work cannot be successful without the input and support of the Metro Director and Assistant Metro Director who act as the "boots on the ground" representatives.

- Set the tone for the energetic recruitment of new members and keep member satisfaction at the forefront of all activities
- Increase new membership and maintain current membership levels via personal and professional outreach and maintain an awareness of regional and/or local issues that may affect membership and address as needed
 - This will be accomplished with input and support from National HQ and the Metro Directors/Assistant Directors
- Assist the HQ Membership team as requested and ensure that all membership activity is aligned with National efforts and activities. This includes:
 - Promoting membership benefits to employees of Company Members with offices in the Chapter's region
 - Prospect for new members in areas of low membership in the Chapter's region

- Welcoming new members in a personal and professional manner. This can be accomplished with an email, welcome packet, phone call or other outreach as appropriate. Early engagement of new members increases the volunteer pool, event attendance and strength of the Chapter.
- Following-up with lapsed Individual Members to determine the reason membership has lapsed, address unmet needs and to try to encourage re-joining the association.
- Directing the renewal call activity which may be conducted on a local level
- Communicating changes or errors in member contact information to HQ if discovered in the course performing remits
- Assess member needs and satisfaction with Regional Chapter offerings
- Provide direction to volunteers who assist with ad hoc or on-going membership activities
- Coordinate with Director of New Professionals and Director of Inclusion and Diversity, as required

Time Commitment: 2-3 hours per week

This time commitment may vary due to the number of new members per month, renewal period calls or other unforeseen initiatives.

- Minimum of 4 Board of Director meetings (recommended monthly)
- Attendance at all Chapter meetings, Regional Conference (with travel stipend from Chapter) and Chapter events in the Metro area where the Director is based
- Attendance at virtual Leadership training sessions conducted by HQ
- Member of the cross-regional Membership Committee, with alignment to the National Membership Committee.

Skills Required:

- Effective verbal and written communication
- Knowledge of Chapter operations
- Ability to collaborate and network
- Organized
- Detail-oriented
- Ability to motivate people to perform at high level
- Ability to delegate effectively
- Leadership

Director of Events (Director-at Large)

Term: Two (2) years but can be re-elected for additional two-year terms as Bylaws permit.

Eligibility: Any member in good standing is eligible.

General Responsibilities: Chapter Directors-at-Large shall provide insight and suggestions on policies brought before the Board.

Directors-at-Large shall:

- Provide direction of Chapter affairs, its committees and publications
- Determine the Chapter's policies and/or changes therein
- Actively pursue the Chapter's objectives and vote on the disbursement of funds
- Provide a communication link between the Chapter membership and the Board
- Approve goals and objectives, which support the execution of the Chapter's strategic plan
- Develop and review assigned committee responsibilities
- Provide expertise to committee chairs and be available for consultation
- Attend scheduled Board meetings and be prepared to discuss agenda items
- Be familiar with the Partnership Agreement and Chapter policies and the Chapter strategic plan
- Distribute assigned committee meeting reports to the Board of Directors
- Perform any other duties assigned by the President or the Board of Directors

Component Area Responsibilities:

The Director of Events shall lead the overall planning and strategy for live or virtual events across the Chapter. This position will contribute to the creation of meaningful and impactful events that provide education, foster strong connections in the insights community, increase revenue, and acquire new supporters to the Chapter.

The Director of Events must demonstrate team leadership and collaboration with other Directors and volunteers to lead and drive the production of high quality events.

- Develop a local and regional event plan and outline goals for event time, date, location, estimated attendance and budget
- Coordinate with Director of Regional Membership Engagement to plan which events are happening in each city, building out the metro event calendar
- Oversee event vendors and vendors and determine best fits for the budget and goals of the event
- Coordinate event logistics and services, including technology and equipment needed to run the event, food, drinks, transportation, and lodging
- Provide training/assistance to directors at the local levels on event planning
- Coordinate and recruit speakers for events
- Coordinate with the Treasurer to plan event budgets for both regional and local events

- Provide event details and collaborate with the Director of Communications for successful event communications
- Actively pursue event partnerships with the Chapter's partners via the coordination of the Director of Partnerships
- Ensure events provide educational and networking value to members

Time Commitment: 2-3 hours per week

This time commitment may vary due to the number of events or other related initiatives in a particular month.

- Minimum of 4 Board of Director meetings (recommended monthly)
- Attendance at all Chapter meetings, Regional Conference (with travel stipend from Chapter) and Chapter events in the Metro area where the Director is based
- Attendance at virtual Leadership training sessions conducted by HQ
- Member of the cross-regional Events Committee, with alignment to the National Events Committee

Skills Required:

- Effective verbal and written communication
- Ability to manage budgets
- Knowledge of Chapter operations
- Ability to collaborate and network
- Organized
- Detail-oriented
- Ability to motivate people to perform at high level
- Ability to delegate effectively
- Leadership

Director of Regional Member Engagement (Director-at Large)

Term: Two (2) years but can be re-elected for additional two-year terms as Bylaws permit.

Eligibility: Any member in good standing is eligible.

General Responsibilities: Chapter Directors-at-Large shall provide insight and suggestions on policies brought before the Board.

Directors-at-Large shall:

- Provide direction of Chapter affairs, its committees and publications
- Determine the Chapter's policies and/or changes therein
- Actively pursue the Chapter's objectives and vote on the disbursement of funds
- Provide a communication link between the Chapter membership and the Board
- Approve goals and objectives, which support the execution of the Chapter's strategic plan
- Develop and review assigned committee responsibilities
- Provide expertise to committee chairs and be available for consultation
- Attend scheduled Board meetings and be prepared to discuss agenda items
- Be familiar with the Partnership Agreement and Chapter policies and the Chapter strategic plan
- Distribute assigned committee meeting reports to the Board of Directors
- Perform any other duties assigned by the President or the Board of Directors

Component Area Responsibilities:

The Director of Regional Member Engagement (RME) is responsible for recruitment, management and support of Metro and Assistant Metro Directors. The RME shall provide insight and suggestions on Member Engagement policies brought before the Board.

- Serve as an Advisor to the Chapter Board and HQ, providing strategic advice and recommendations on Member Engagement initiatives in the Chapter's region
- Designated contact for local leaders (Metro Directors and Assistant Metro Directors)
 - Recruit and manage Metro Directors & Assistant Metro Directors
 - Serve as advisor / mentor to Metro Directors & Assistant Metro Directors
 - Help to resource volunteers in new metro areas
- Support Metro Directors & Assistant Directors in their efforts to program events and engage with their local insights professionals
- Serve as the communication touchpoint between Metro Directors / Assistant Metro Directors, the Chapter Board and HQ
 - Other Board members who have information / requests to disseminate locally will coordinate via the RME
 - Prioritize requests and messaging to the local leaders
 - Communicate with HQ regarding dates and details of metro events.

- Coordinate with other Board members on relevant activities
 - With Director of Events to coordinate scheduling and planning in metro areas
 - With Treasurer and Treasurer Elect to distribute event budgets and ensure that expense reimbursements are returned to the Regional Board in a timely manner
 - With Director of Communications to coordinate marketing for metro events
 - With Director of Partnerships to coordinate collaborations with other associations and sponsorship opportunities at the metro level
 - With Directors of Membership & New Professionals on outreach / prospecting needs

Time Commitment: 2-3 hours per week

This time commitment may vary due to the number of events and other initiatives scheduled to be addressed in a particular month.

- Minimum of 4 Board of Director meetings (recommended monthly)
- Attendance at all Chapter meetings, Regional Conference (with travel stipend from Chapter) and Chapter events in the Metro area where the Director is based
- Attendance at virtual Leadership training sessions conducted by HQ
- Member of the cross-regional Member Engagement Committee, with alignment to HQ Membership Committee.

Skills Required:

- Effective verbal and written communication
- Knowledge of Chapter operations
- Ability to collaborate and network
- Deft project management
- Organized
- Detail-oriented
- Ability to motivate people to perform at high level
- Ability to delegate effectively
- Leadership

**** Each Board may choose to place more than one Director of Regional Engagement, based on the number of Metro areas in the Chapter's footprint.***

It is recommended that each Director of Regional Engagement should manage no more than 3-5 Metro areas, dependent on the size/reach of those areas.

Director of Partnerships (Director-at Large)

Term: Two (2) years but can be re-elected for additional two-year terms as Bylaws permit.

Eligibility: Any member in good standing is eligible.

General Responsibilities: Chapter Directors-at-Large shall provide insight and suggestions on policies brought before the Board.

Directors-at-Large shall:

- Provide direction of Chapter affairs, its committees and publications
- Determine the Chapter's policies and/or changes therein
- Actively pursue the Chapter's objectives and vote on the disbursement of funds
- Provide a communication link between the Chapter membership and the Board
- Approve goals and objectives, which support the execution of the Chapter's strategic plan
- Develop and review assigned committee responsibilities
- Provide expertise to committee chairs and be available for consultation
- Attend scheduled Board meetings and be prepared to discuss agenda items
- Be familiar with the Partnership Agreement and Chapter policies and the Chapter strategic plan
- Distribute assigned committee meeting reports to the Board of Directors
- Perform any other duties assigned by the President or the Board of Directors

Component Area Responsibilities:

This position will serve as the liaison to the Chapter's association partners, as well as its sponsors, in coordination with the HQ teams overseeing these initiatives. Collaboration and coordination with the Chapter Board will be required, to ensure awareness of engagement opportunities with the Association's and Chapter's partners and sponsors.

- Serve as an Advisor to the Chapter Board and HQ, providing strategic advice and recommendations on partnership initiatives in the Chapter's region
- Lead the effort (if necessary, via the establishment / chairing of a dedicated committee) to form new partnerships/maintain current partnerships, both with other associations and, in conjunction with HQ, with corporate partners/sponsors with the Chapter's geographic footprint
- Provide a communication link between the Chapter's partners and the Board
- Coordinate with the collection of sponsorship funds as required with the Treasurer and Treasurer-Elect
- Ensure the Chapter engages with its partners when scheduling speakers for Chapter learning events
- Actively pursue event partnerships, with the coordination of the Director of Events, Treasurer (as required) and Director of Regional Member Engagement

Time commitment: 2-3 hours per week

This time commitment may vary due to the number of events and other initiatives scheduled to be addressed in a particular month.

- Minimum of 4 Board of Director meetings (recommended monthly)
- Attendance at all Chapter meetings, Regional Conference (with travel stipend from Chapter) and Chapter events in the Metro area where the Director is based
- Attendance at virtual Leadership training sessions conducted by HQ
- Member of the cross-regional Partnership Committee, with alignment to the HQ account management / revenue generation teams.

Skills Required:

- Effective verbal and written communication
- Knowledge of Chapter operations
- Ability to collaborate
- Detail-oriented
- Ability to motivate people to perform at high level
- Ability to delegate effectively
- Leadership

Director of Communications (Director-at Large)

Term: Two (2) years but can be re-elected for additional two-year terms as Bylaws permit.

Eligibility: Any member in good standing is eligible.

General Responsibilities: Chapter Directors-at-Large shall provide insight and suggestions on policies brought before the Board.

Directors-at-Large shall:

- Provide direction of Chapter affairs, its committees and publications
- Determine the Chapter's policies and/or changes therein
- Actively pursue the Chapter's objectives and vote on the disbursement of funds
- Provide a communication link between the Chapter membership and the Board
- Approve goals and objectives, which support the execution of the Chapter's strategic plan
- Develop and review assigned committee responsibilities
- Provide expertise to committee chairs and be available for consultation
- Attend scheduled Board meetings and be prepared to discuss agenda items
- Be familiar with the Partnership Agreement and Chapter policies and the Chapter strategic plan
- Distribute assigned committee meeting reports to the Board of Directors
- Perform any other duties assigned by the President or the Board of Directors

Component Area Responsibilities:

The Director of Communications will set and guide the strategy for development and implementation of all marketing, communications, website, and public relations messages and collateral to consistently articulate the Chapter's mission. The Director of Communications directs the efforts of the marketing, communications volunteers and coordinates closely with other directors within the Chapter as the communications partner on a variety of strategic initiatives.

- Develop, implement, and evaluate the annual communications plan across the Chapter's audiences in collaboration with the chapter board.
- Lead the generation of online content that engages members and leads to measurable action.
- Put communications vehicles in place to create momentum and awareness of events and other Chapter initiatives
- Manage the development, distribution, and maintenance of all print and electronic collateral including, but not limited to, newsletters, programs, and the Chapter's web presence
- Mentor and lead a volunteer responsible for the Chapter social media channels

- Coordinate webpage maintenance—ensure that new and consistent information (article links, stories, and events) is posted regularly
- Track and measure the level of engagement within the network over time
- Manage all member contacts

Time Commitment: 2-3 hours per week

This time commitment may vary due to the number of events and other initiatives scheduled to be addressed in a particular month.

- Minimum of 4 Board of Director meetings (recommended monthly)
- Attendance at all Chapter meetings, Regional Conference (with travel stipend from Chapter) and Chapter events in the Metro area where the Director is based
- Attendance at virtual Leadership training sessions conducted by HQ
- Member of the cross-regional Communications Committee, with alignment to HQ Communications team.

Skills Required:

- Effective verbal and written communication
- Knowledge of Chapter operations
- Ability to collaborate and network
- Organized
- Detail-oriented
- Ability to motivate people to perform at high level
- Ability to delegate effectively
- Leadership

Director of Inclusion and Diversity (Director-at Large)

Term: Two (2) years but can be re-elected for additional two-year terms as Bylaws permit.

Eligibility: Any member in good standing is eligible.

General Responsibilities: Chapter Directors-at-Large shall provide insight and suggestions on policies brought before the Board.

Directors-at-Large shall:

- Provide direction of Chapter affairs, its committees and publications
- Determine the Chapter's policies and/or changes therein
- Actively pursue the Chapter's objectives and vote on the disbursement of funds
- Provide a communication link between the Chapter membership and the Board
- Approve goals and objectives, which support the execution of the Chapter's strategic plan
- Develop and review assigned committee responsibilities
- Provide expertise to committee chairs and be available for consultation
- Attend scheduled Board meetings and be prepared to discuss agenda items
- Be familiar with the Partnership Agreement and Chapter policies and the Chapter strategic plan
- Distribute assigned committee meeting reports to the Board of Directors
- Perform any other duties assigned by the President or the Board of Directors

Component Area Responsibilities:

This position will serve as the touchpoint and leader for the Chapter's activities targeted towards inclusion and diversity focused initiatives as established by and under the coordination of the Insights Association.

- Serve as an Advisor to the Chapter Board and IDEA Council, providing strategic advice and recommendations on inclusion and diversity focused initiatives in the Chapter's region
- Lead the effort to expand representation of marginalized groups at Chapter events via the establishment / chairing of a dedicated committee to promote and monitor inclusion and diversity initiatives within the Chapter
- Establish a program within the Chapter's geographic footprint to engage with students from under-represented communities, built on the suggestions from the IDEA Council and the cross-regional Inclusion & Diversity Committee
- Ensure the Chapter engages a diverse and inclusive group of speakers for Chapter learning events

Time Commitment: 2-3 hours per week

This time commitment may vary due to the number of initiatives scheduled to be addressed in a particular month.

- Minimum of 4 Board of Director meetings (recommended monthly)
- Attendance at all Chapter meetings, Regional Conference (with travel stipend from Chapter) and Chapter events in the Metro area where the Director is based
- Attendance at virtual Leadership training sessions conducted by HQ
- Member of the cross-regional Inclusion & Diversity Committee, with alignment to the IDEA Council

Skills Required:

- Effective verbal and written communication
- Knowledge of Chapter operations
- Ability to collaborate and network
- Organized
- Detail-oriented
- Ability to motivate people to perform at high level
- Ability to delegate effectively
- Leadership

Director of New Professionals (Director-at Large)

Term: Two (2) years but can be re-elected for additional two-year terms as Bylaws permit.

Eligibility: Any member in good standing is eligible. It is recommended that this position be held by either a Faculty or Student member of the Chapter. If that is not feasible, it is recommended that the position be held by an alumnus of a university/college within the Chapter's geographic footprint.

General Responsibilities: Chapter Directors-at-Large shall provide insight and suggestions on policies brought before the Board.

Directors-at-Large shall:

- Provide direction of Chapter affairs, its committees and publications
- Determine the Chapter's policies and/or changes therein
- Actively pursue the Chapter's objectives and vote on the disbursement of funds
- Provide a communication link between the Chapter membership and the Board
- Approve goals and objectives, which support the execution of the Chapter's strategic plan
- Develop and review assigned committee responsibilities
- Provide expertise to committee chairs and be available for consultation
- Attend scheduled Board meetings and be prepared to discuss agenda items
- Be familiar with the Partnership Agreement and Chapter policies and the Chapter strategic plan
- Distribute assigned committee meeting reports to the Board of Directors
- Perform any other duties assigned by the President or the Board of Directors

Component Area Responsibilities:

This position will serve as the touchpoint and leader for the Chapter's activities targeted towards students and young professionals. Collaboration and coordination with the Chapter Board will be required to ensure engagement opportunities are created with this target audience.

- Serve as an Advisor to the Chapter Board, providing strategic advice and recommendations on student and young professional engagement activities
- Lead the effort to expand representation of and connection with students and young professionals in the Chapter's membership, in coordination with the HQ Membership team
- Coordinate planned actions with the Chapter's Director of Membership and Director of Inclusion and Diversity to ensure alignment and consistency in approach
- Ensure the Chapter's event plans includes learning and networking programs targeted to students and young professionals
- Establish a mentor program to connect students and young professionals with more seasoned members of the Chapter's insights community.

Time Commitment: 2-3 hours per week

This time commitment may vary due to the number events and other initiatives scheduled to be addressed in a particular month.

- Minimum of 4 Board of Director meetings (recommended monthly)
- Attendance at all Chapter meetings, Regional Conference (with travel stipend from Chapter) and Chapter events in the Metro area where the Director is based
- Attendance at virtual Leadership training sessions conducted by HQ
- Member of the cross-regional Membership Committee, with alignment to the National Membership Committee.

Skills Required:

- Effective verbal and written communication
- Knowledge of Chapter operations
- Ability to collaborate and network
- Organized
- Detail-oriented
- Ability to motivate people to perform at high level
- Ability to delegate effectively
- Leadership

Metro Director and Assistant Metro Director

Each Chapter will identify, with assistance from HQ and the Chapter Committee, metro areas which support both members and potential members of the Insights Association.

The role of the Metro Director and Assistant Metro Director has been developed to provide these audiences with a single point of contact for Chapter engagement, volunteer development, questions, and or concerns.

In general, these positions will:

- Report into Director of Regional Member Engagement
- Be responsible for gathering wants/needs/suggestions for their metro area to present to the Chapter Board via the Director of Regional Member Engagement
- Provide direct connection to IA target audience (member, non-members) in their area
 - Event / Activity focused
 - Engagement /outreach focused
- Be supported by a team of volunteers
- Receive financial support and direction from the Chapter Board

The primary responsibilities of the Metro Director are to:

- Produce a minimum of 2 events in the metro area on an annual basis
- Be the eyes, ears and 'boots on the ground' for local members to experience a connectedness to the Chapter, its Board and the Association
- Act as a conduit between local and regional information and issues
- Assist the Chapter Board with member recruitment, outreach, and engagement
- Support the activities of the Chapter Board via coordination with the Director of Regional Member Engagement
- Develop a volunteer base to assist in the execution of local activities and events
- Perform duties as the point of contact for local events, including but not limited to, :
 - Suggest mode of presentation (in-person, virtual) based on local mandates and local health safety concerns
 - Site selection (if in person)
 - Logistics and catering suggestions
 - Promotion of the events via social media
 - Development of and adherence to event budgets in coordination with Regional Director of Member Engagement
 - Coordinate with the Director of Regional Engagement to ensure that there is no schedule or content overlaps with other HQ or Chapter activity
- Be aware of and encourage collaboration with local associations of like interest (QRCA, AAPOR, etc.)

Assistant Metro Director

The Assistant Metro Director will assist and support the Metro Director in all tasks assigned by the Metro Director.

There may be tasks or events that are the sole responsibility of the Assistant Metro Director, but such assignments will be based on the needs of the Metro Director, unique talents of the Assistant Metro Director and specific needs of the Chapter and its membership.

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### **Time Commitment**

It is expected that these roles will require approximately 2-3 hours per week

*This is an average and may vary widely depending on time sensitive needs such as in-person events, membership drives, etc.*

### **Skills Required:**

- Effective verbal and written communication
- Ability to collaborate and network
- Organized
- Detail-oriented
- Ability to motivate people
- Ability to delegate effectively
- Self-directed and self-motivated