

AFP Silicon Valley Chapter
Board Member Job Descriptions - 2021

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President

(Elected Position)

Length of Term: 1 year as President-elect, 1 year as President, 1 year as Immediate Past President

Average Time Commitment per Month: 40 hours

General Function of the Position:

The President oversees activities of the Chapter membership. Accordingly, the President is accountable to the entire Chapter.

Job Know How and Principal Activities:

The President is a Chapter member in good standing with at least seven years' experience in the development field. Excellent organizational and people skills a must.

- Call meetings of the Board of Directors, plan the agenda and lead meetings to conduct the business of the Chapter in a timely way
- Recruit and appoint chairs for the non-elected standing and special committees of the Board
- Support, supervise, and encourage Vice Presidents and other Board members in their duties
- Conduct one-on-one meetings as necessary
- Attend committee meetings when necessary
- Attend regularly scheduled Board meetings and retreats
- Represent the Chapter at public meetings and with the media as needed
- Represent the Chapter at Philanthropy Day
- Represent the Chapter at regional meetings of AFP Presidents or appoint a representative
- Represent the Chapter as a delegate to the Chapter Presidents Council
- Ensure that activities of the Chapter are conducted in accordance with the Bylaws and applicable laws
- Coordinate planning for the long-term continuity and health of the Chapter, including Chapter goals and objectives.
- Plan annual board retreat with President-elect
- Work with the President-Elect for a smooth transition of responsibilities
- Review, provide feedback, and sign all partnership and individual consultant contracts for the chapter
- Act as a liaison with the Administrative Assistant for the Chapter by managing their time with board members. Meet with them once a month to discuss and modify current procedures and communication methods
- Supports AFP SV Annual Campaign as well as AFP Global's annual campaign through a personal contribution
- Support Board members in their duties, as needed
- Serve as a sounding board for Board members and SVC members

Effect on End Results:

As a direct result of the efforts of the President, the following will occur:

- President-Elect, Vice Presidents and Committee Chairs are inspired to plan and carry out activities and programs in support of Chapter membership
- President-Elect and Vice President-Elects have a clear vision and enthusiasm for their pending responsibilities
- The Chapter membership continues to grow, both in numbers and professional development
- The Chapter membership reflects the diversity of the community and sector
- The public recognizes the contributions and ethical standards of the professional fundraising community

President-Elect

(Elected Position)

Length of Term: 1 year as President-Elect, 1 year as President, 1 year as Immediate Past President

Average Time Commitment per Month: 15 - 20 hours

General Function of the Position:

The President-elect assists the President in overseeing activities of the Chapter membership.

Job Know How and Principal Activities:

- The President-elect is a Chapter member in good standing with at least seven years' experience in the development field. The President-elect is a full-partner with the Board President
- In absence of the President, calls meetings of Board of Directors, plans the agenda and leads meetings to conduct the business of the Chapter in a timely way
- Attends regularly scheduled Board meetings and retreats
- Serves on the Nominations Committee to assess and recommend slate of elected positions and assists appointment of chairs for the non-elected standing and special committees of the Board
- Works in partnership with the President to research and implement new programs approved by the Board of Directors
- Provides orientation for new Board members before the beginning of their terms
- Reviews and evaluates year-end reports of committee activities
- Helps plan and implement mid-year and year-end Board retreats
- Completes the Chapter Ten Star award application
- Complete the Accord report for AFP International
- Represents the Chapter as a delegate to the Chapter Presidents' Council
- Attends the AFP Leadership Academy and annual AFP International Conference
- Supports AFP SV Annual Campaign as well as AFP Global's annual campaign through a personal contribution
- Supports the Chapter President, Executive Committee, and Board, and serve as a liaison to a Board VP, providing support and coaching as necessary

Effect on End Results:

As a direct result of the efforts of the President-Elect, the following will occur:

- Vice Presidents and Committee Chairs are inspired to plan and carry out activities and programs in response to and in support of Chapter membership
- Vice Presidents-Elect has a clear vision and enthusiasm for their pending responsibilities
- The Chapter membership continues to grow, both in numbers and professional development
- The Chapter membership reflects the diversity of the community and sector
- The public recognizes the contributions and ethical standards of the professional fundraising community

Immediate Past President

(Elected Position)

Length of Term: 1 year Immediate Past President

Average Time Commitment per Month: 10 hrs

General Function of the Position:

Serves as Chair of Nominations Committee to provide Chapter leadership for subsequent year(s) by securing a slate of qualified candidates to be elected to the Board of Directors by the membership of AFP, Silicon Valley Chapter. Oversees selection of qualified candidates to fill current vacancies in elect and other one-term positions.

Job Know How and Principal Activities:

- Recruit and chair a Nominating Committee, consisting of the Past-President, President, President- Elect and other senior level AFP members, as needed
- Attend regularly scheduled Board meetings and retreats
- Solicit updated job descriptions from Board members
- Develop a plan and timeline to identify and recruit viable Board candidates
- Publicize/market the benefits of involvement and taking leadership to Chapter members
- Seek nominations of candidates, including self-nominations, from the AFP membership
- Evaluate nominations and recruit additional candidates, as needed
- Present a slate of candidates to the membership for election to the Board of Directors
- Work with Board of Directors to fill any vacancies that occur throughout the year due to resignations
- Prepare and send a welcome letter to new members to the Board for the subsequent year
- Participate in planning orientation for new Board members
- Prepare Chapter Service award nomination timeline, collect nominations, review nominations, convene committee to make selection, order award, present award at December meeting.
- Provide assistance to the President and President-elect, as needed, to ensure policy and historical continuity
- Supports AFP SV Annual Campaign as well as AFP Global's annual campaign through a personal contribution

- Supports the Chapter President, Executive Committee, and Board, and serve as a liaison to a Board VP, providing support and coaching as necessary

End Results:

- Continuity of able and committed Chapter leadership
- Awareness throughout the Chapter of the benefits of assuming leadership positions
- Awareness throughout the Chapter of the leadership opportunities available to members

Treasurer

(Elected Position)

Length of Term: 1 year as Treasurer

Average Time Commitment per Month: 8-10 hours

General Function of the Position:

Responsible for the maintenance of all fiscal records for the Chapter, including financial reports, budgets, investments and monthly reports to the Board.

Job Know How and Principal Activities:

- Treasurer is a member of the Officer's Committee and is expected to attend the majority of these monthly meetings
- Direct the maintenance of financial records (QuickBooks Online Edition) by the Chapter Bookkeeper
- Working knowledge of Excel
- Review monthly financial reports including budget versus actuals and balance sheet
- Attend regularly scheduled Board meetings and retreats
- Work with Chapter Bookkeeper on reconciliation of bank and investment accounts
- Review invoices and sign checks prepared by the Chapter Bookkeeper
- Train Treasurer-Elect on budget preparation for following year
- Oversee Treasurer-Elect in developing budget and subsequent drafts and present final budget to Board for approval
- Advise and prepare reports to the Board on financial issues relating to the Chapter
- Work with the Chapter Bookkeeper to coordinate the preparation of annual tax forms using local CPA and coordinate payment of any fees due the Franchise Tax Board and IRS
- Supports AFP SV Annual Campaign as well as AFP Global's annual campaign through a personal contribution
- Supports the Chapter President, Executive Committee, and Board, and serve as a liaison to a Board VP, providing support and coaching as necessary

End Results:

- Oversight provided for setting of membership fees and event prices

- Sound management provided for Chapter investments
- Careful monitoring provided of decisions affecting the financial well-being of the Chapter
- Leadership provided for financial planning for immediate and long-term need of the Chapter

Treasurer-Elect

(Elected Position)

Length of Term: 1 year as Treasurer-Elect, 1 year as Treasurer

Average Time Commitment per Month: 6-8 hours

General Function of the Position:

Responsible for assisting the treasurer with the maintenance of all financial records for the Chapter. Collaborate with VP Elects to prepare a budget for upcoming fiscal year for approval by the Board.

Job Know How and Principal Activities:

- Assists Treasurer with oversight of all financial records and Chapter investments
- Lead Board process to draft and present budget for upcoming fiscal year
- Working knowledge of Excel
- Attend regularly scheduled Board meetings and retreats
- Become familiar with QuickBooks system, financial reports, and investment structure
- Assemble/update job descriptions for Treasurer and Treasurer-Elect
- Announce budget preparation process at July or August Board meeting
- Prepare and present budget-planning worksheets to VP elects and Chairs for upcoming year's budget
- Develop a draft budget for presentation to Officers Committee and to the full Board for approval in advance of start of new fiscal year (November or December)
- Assemble/update current year financial reports and documents for inclusion in the Google Drive financials folder.
- Supports AFP SV Annual Campaign as well as AFP Global's annual campaign through a personal contribution
- Supports the Chapter President, Executive Committee, and Board, and serve as a liaison to a Board VP, providing support and coaching as necessary

End Results:

- Accurate and well-maintained Chapter financial records
- Continuity of financial leadership for the Chapter

- Continuity in strategic planning for financial management and sound investment of Chapter resources



Secretary

(Elected Position)

Length of Term: 1 year as Secretary

Average Time Commitment per Month: 10-12 hours

General Function of the Position:

The Secretary supports the administrative function of the Board. This includes, but is not limited to, the following: notifying Board members of monthly report deadlines, preparing and emailing meeting notices and Board packets, taking minutes at Board meetings.

Job Know How and Principal Activities:

The Secretary is a Chapter member in good standing with at least two years' experience in the development field. The Secretary is expected to attend the majority (80 percent) of Board meetings, including retreats, and to secure back-up if unable to take minutes at any of these meetings. In addition, the Secretary is a member of the Executive Committee and is expected to attend the majority of these monthly meetings.

- Attend regularly scheduled Board meetings and retreats
- Prepare Agenda informed by Exec Committee
- Send Board Meeting reminders and meeting requests
- Record and write up minutes of all Board meetings
- Distribute meeting minutes to all Board members
- Provides Chapter Administrator with copies of all board packets, including minutes
- Work with VPs and Committee Chairs to obtain monthly written reports
- Maintain the Board Roster
- Work with Administrator to maintain/update the book of minutes, Chapter policies, procedures and changes of bylaws
- Manage sign up sheet for snacks and coffee for at board meetings
- Supports AFP SV Annual Campaign as well as AFP Global's annual campaign through a personal contribution
- Serve as liaison between Executive Committee and one or two other selected committee
- Oversee the compilation and upkeep of the Board Calendar

- Share correspondence received, as well as send correspondence as appropriate (i.e. sympathy cards, special thank yous)
- Supports the Chapter President, Executive Committee, and Board, and serve as a liaison to a Board VP, providing support and coaching as necessary

End Results:

- Board members will be apprised of all major decisions and activities rendered at Board meetings
- The integrity of record keeping will be upheld
- An informed Board

VP Development

(Elected Position)

Length of Term: 1 year as VP of Development

Average Time Commitment per Month: 10-15 hours

General Function of the Position:

The VP Development coordinates all fundraising efforts for the Chapter and assists the Chapter in successfully raising the approved annual income budget. The intent for chapter development efforts includes raising funds through developing and cultivating lasting relationships and setting a best practices example of ethical fundraising and stewardship.

Job Know-How and Principal Activities:

- Attend regularly scheduled Board meetings and retreats
- The VP Development, with the Chapter Development Committee, leads a collaborative effort of chapter fundraising that raises the budgeted sponsorship income and involves the coordinated efforts of all chapter leaders and committee members responsible for specific program activities
- Provide a strategic approach to chapter fundraising through an annual development plan based on the approved chapter budget
- A Development Committee is organized and operated with representation that fosters collaborative and united fundraising efforts
- Work with other chapter leaders and committees in developing appropriate case statements and promotional materials for fundraising efforts
- Manage and coordinate a thorough prospect and donor management process that includes identification, qualification, cultivation, matching interests, recognition/sponsorship, and stewardship
- Consider supplementing existing recognition and sponsorship opportunities with a coordinated array of sponsorship opportunity packages, with associated benefits as necessary
- Ensures sponsors and donors are appropriately recognized for their gifts
- Supports AFP SV Annual Campaign as well as AFP Global's annual campaign through a personal contribution

End Results:

- An increased amount of funds and the budgeted sponsorship income for the chapter is successfully raised
- AFP standards and best practices for fundraising are exemplified

- Number of AFP Silicon Valley Chapter donors and supporters is increased through cultivation
- Model stewardship, recognition and sponsorship opportunities are successfully used in chapter fundraising, resulting in repeating support and lasting relationships
- An effective chapter fundraising database is kept current and relied upon for the ongoing development program

VP-Elect Development

(Elected Position)

Length of Term: 1 year as VP-Elect of Development, 1 year a VP of Development

Average Time Commitment per Month: 8 hours

General Function of the Position:

The VP-Elect of Development assists the VP of Development in coordinating all fundraising efforts for the Chapter and assisting the Chapter in successfully raising the annual approved budgeted sponsorship income. The intent for chapter development efforts includes raising funds through developing and cultivating lasting relationships and setting best-practices examples of ethical fundraising and stewardship.

Job Know-How and Principal Activities:

- The VP-Elect of Development assists the VP of Development with the Development Committee to lead a collaborative effort of chapter fundraising that raises the budgeted sponsorship income and involves the coordinated efforts of all chapter leaders and committee members responsible for specific program activities.
- Attend regularly scheduled Board meetings and retreats
- Provide a strategic approach to chapter fundraising through an annual development plan based on the approved chapter budget
- A Development Committee is organized and operated with representation that fosters collaborative and united fundraising efforts
- Work with other chapter leaders and committees in developing appropriate case statements and promotional materials for fundraising efforts
- Manage and coordinate a thorough prospect and donor management process that includes identification, qualification, cultivation, matching interests, recognition/sponsorship, and stewardship
- Oversees fundraising database management
- Considers supplementing existing recognition and sponsorship opportunities with a coordinated array of sponsorship opportunity packages, with associated benefits
- With support of development committee, coordinate chapter's annual giving campaign; activities may include:
 - Plan theme and motto

- Write and distribute case statement, content for website, thank you letters, etc.
- Plan method of campaign, i.e. mailer, online letters, phone bank, luncheon announcements
- Determine campaign timeline
- Supports AFP SV Annual Campaign as well as AFP Global's annual campaign through a personal contribution

End Results:

- An increased amount of funds and the budgeted sponsorship income for the chapter is successfully raised
- AFP standards and best practices for fundraising are exemplified
- Number of AFP Silicon Valley Chapter donors and supporters is increased through cultivation
- Model stewardship, recognition and sponsorship opportunities are successfully used in chapter fundraising, resulting in repeating support and lasting relationships
- An effective chapter fundraising database is kept current and relied upon for the ongoing development program
- Accurate and well-maintained annual campaign financial records
- Maintain or increase member participation in annual campaign

VP IDEA (Inclusion, Diversity, Equity, and Access)

(Elected Position)

Length of Term: 1 year as VP of IDEA

Average Time Commitment per Month: 10-15 hours

General Function of the Position:

The Vice President of Diversity oversees IDEA: Inclusion, Diversity, Equity and Access activities of the Chapter through management of the IDEA Committee and IDEA Fellowship. The VP IDEA manages one or more IDEA initiatives and assists the VP-Elect of IDEA as determined between them. This is a unique position where you can take ownership of training for IDEA Fellows. You will serve as an ambassador for Inclusion, Diversity, Equity and Access within our Chapter and community.

Job Know How and Principal Activities:

- This job requires two years experience in fundraising, evidence of being an advocate of the principles of IDEA with emphasis on inclusion and cultural competency, excellent organization, communication, and people skills
- Provide guidance to and coordinate IDEA Committee members and their activities
- Work in collaboration with the Board/VPE IDEA to recruit and manage the IDEA Fellowship Program
- Fundraise to underwrite the IDEA Fellowship in partnership with the Board Members
- Ensure Committee members are represented on key Chapter committees (Membership, Programs, Education, Professional Development)
- Coordinate and facilitate IDEA Committee meetings and IDEA Fellowship Training/Mixers/Workshops
- Provide training and orientation for IDEA Fellows and new members interested in the principles of IDEA
- Empower chapter members to be advocates of diversity, inclusion, equity and access issues and encourage them to seek further involvement with the Chapter
- Identify community leaders and a Senior Advisor (as needed) to participate on the Committee
- Support the integration of diversity and inclusion efforts of Chapter committees, particularly in monthly luncheon programs
- Attend regularly scheduled Board meetings and retreats

- Supports AFP SV Annual Campaign as well as AFP Global's annual campaign through a personal contribution
- Develop and implement outreach methods so that the demographics of our region (in terms of ethnicity, race, gender, religion and sexual orientation) are reflected in our membership and at the board/committee level
- The VP of IDEA and/or the VP-Elect of IDEA schedule IDEA Fellowship and committee meetings and set the agendas
- Training and Orientation – the VP of IDEA and/or the VP-Elect of IDEA schedule and facilitate IDEA trainings and orientations for IDEA Fellows new Diversity Committee members 1:1 or in small groups
- In collaboration with VPE Idea and Board, plan the IDEA luncheon in September

End Results

- Every fellow and committee member works to further the Chapter's diversity goals
- We graduate 10 IDEA fellows each year and increase the diversity of our Chapter while serving as a leader in this work for other AFP Chapters.
- The chapter will continue to become more inclusive and reflective of our community

Key deadlines

- October 1 to October 30: Applications for IDEA Fellowship Open
- November 1 to November 30 is Decision Making Time. Previous IDEA Leadership is invited to weigh in on the selection of the cohort of fellows
- December 1 to December 30: Fellows are notified, orientation packets created, communication begins for first mixer and meeting in January.
- January Chapter Meeting: Launch of the IDEA Fellowship
- January 31
The Friends of Diversity Designation
<http://www.afpnet.org/files/ContentDocuments/FriendsofDiversityForm.pdf>
- Mid-July
The Charles R. Stephens Excellence in Diversity Award
- September
The IDEA Luncheon

VP-Elect IDEA (Inclusion, Diversity, Equity, and Access)

(Elected Position)

Length of Term: 1 year as VP-Elect of IDEA, 1 Year as VP of IDEA

Average Time Commitment per Month: 10-15 hours

General Function of the Position:

The VP-Elect of IDEA works in partnership with the VP of IDEA to promote diversity activities of the Chapter through management of the IDEA Committee and the IDEA Fellows. The VP-Elect IDEA manages one or more IDEA initiatives and assists the VP of IDEA as determined between them. This is a unique position where you can take ownership of training for IDEA Fellows. You will serve as an ambassador for Inclusion, Diversity, Equity and Access within our Chapter and community.

Job Know How and Principal Activities

- This job requires two years experience in fundraising, evidence of being an advocate of diversity, excellent organization, communication, and people skills
- Work in collaboration with the Board/VPE IDEA to recruit and manage the IDEA Fellowship Program
- Fundraise to underwrite the IDEA Fellowship in partnership with the Board Members
- Provide guidance to and coordinate IDEA Fellows and IDEA Committee members and their activities
- Coordinate and facilitate IDEA Committee meetings and IDEA Fellowship trainings in partnership with the VP IDEA
- Provide training and orientation for new committee members interested in diversity
- Empower committee and chapter members to be advocates of diversity and encourage them to promote IDEA within the Chapter
- Identify community leaders and a Senior Advisor (as needed) to participate on the Committee
- Support the diversity efforts and recruitment efforts of the IDEA Fellowship for the Chapter
- Attend regularly scheduled Board meetings and retreats
- Supports AFP SV Annual Campaign as well as AFP Global's annual campaign through a personal contribution
- Better integrate diversity in all chapter efforts, particularly in monthly luncheon programs
- Develop and implement outreach methods so that the demographics of our region (in terms of

ethnicity, race, gender, religion, and sexual orientation) are reflected in our membership and at the board/committee level

- Budget planning - the VP-Elect of IDEA works with other VP-Elects to develop the budget for diversity activities in the upcoming year

End Results:

- Ensure the IDEA committee works to further the Chapter's diversity goals
- Graduate 10 IDEA fellows each year and increase the diversity of our Chapter while serving as a leader in this work for other AFP Chapters.
- Ensure the Chapter will continue to become more inclusive and reflective of our community
- Minimally, the budget will be revenue neutral

Process for Major Activities

The VP of IDEA and/or the VP-Elect of IDEA schedule committee meetings and set the agendas in partnership and collaboration; Training and Orientation – the VP of IDEA and/or the VP-Elect of IDEA schedule and facilitate trainings and orientations for new IDEA Committee recruits 1:1 or in small groups

Key deadlines

- October 1 to October 30: Applications for IDEA Fellowship Open
- November 1 to November 30 is Decision Making Time. Previous IDEA Leadership is invited to weigh in on the selection of the cohort of fellows
- December 1 to December 30: Fellows are notified, orientation packets created, communication begins for first mixer and meeting in January.
- January Chapter Meeting: Launch of the IDEA Fellowship
- January 31: The Friends of Diversity Designation
<http://www.afpnet.org/files/ContentDocuments/FriendsofDiversityForm.pdf>
- Mid-July: The Charles R. Stephens Excellence in Diversity Award (apply only as appropriate)
Please check the AFP website www.afpnet.org for application and due date(s)
- September
The IDEA Luncheon

VP Education

(Elected Position)

Length of Term: 1 year as VP of Education

Average Time Commitment per Month: 15 - 25 hours

General Function of the Position:

The Vice President of Education supports professional development and advancement of Chapter membership. This includes, but is not limited to, the following: Mentorship Program, Masters Series, webinar conferences, The Fundraising School or similar multiple-day course, CFRE preparation (including CFRE study groups and/or CFRE review course), and contributions to the e-news about professional development opportunities.

Know How and Principal Activities:

- The Vice President of Education is a Chapter member in good standing with at least three years' experience in the development field. Excellent organizational and people skills are a must
- The Vice President of Education will assist in the Chapter's overall efforts to accomplish the following: 1) guide newer fundraising professionals in accessing information (and people) that will support career development and ultimately, development of the fundraising field; 2) inspire "seasoned" professionals in their continued career growth; 3) promote new Chapter membership by involving non-members in education program offerings; and 4) promote new Chapter membership by offering member-only opportunities in education program offerings
- For example, these goals may be achieved through the following activities: 1) promotion of CFRE certification through a workshop panel, for example, before or after a luncheon, 2) Mentorship program, 3) Master Series programs, 4) presentation of The Fundraising School, 5) quarterly webinars 6) one lunch and learn at a prominent location (past have been on the LinkedIn and Facebook campuses; and others that are identified throughout the year
- Supports AFP SV Annual Campaign as well as AFP Global's annual campaign through a personal contribution
- Attend regularly scheduled Board meetings and retreats
- Oversee Education Committee and delegate required activities to them for coordination and planning

Effect on End Results:

As a direct result of the efforts of the Vice President of Education, the following will occur:

- Chapter members will participate in preparation for the CFRE process

- Fifteen participants or more will benefit from the experiences and counsel provided by mentors
- As appropriate, launch any new programs that are felt to benefit the education needs of the membership
- Education portion of the budget will reflect positive net income due to program fees and fundraising sponsorships

VP-Elect Education

(Elected Position)

Length of Term: 1 year as VP-Elect of Education, 1 year as VP of Education

Average Time Commitment per Month: 10 hours

General Function of the Position:

The Vice President-Elect-Education assists the Vice President-Education with the educational activities of the chapter with the goal of serving the membership and developing the fundraising field.

Responsible for ensuring that all eligible Chapter educational activities and programs are certified for CEU credits through CFRE International www.cfre.org

Know-How and Principal Activities:

This job requires two years' experience in fundraising, as well as excellent organization, communication, and people skills. Principal activities are designed to:

- 1) guide newer fundraising professionals in accessing information and providing networking opportunities that will support career growth and development of the fundraising field;
 - 2) inspire "seasoned" professionals in their continued career growth; and
 - 3) promote membership by involving non-members in education program offerings
 - 4) promote new Chapter membership by offering member-only opportunities in education program offerings
- These goals may be achieved through the following activities:
 - 1) promotion of CFRE certification,
 - 2) Mentorship program,
 - 3) Master Series programs,
 - 4) presentation of The Fundraising School (or similar multiple-day course), and others that are identified throughout the year. VP of Education should work directly with other VPs to coordinate efforts and develop an annual strategy.
 - The Vice President-Elect-Education will serve on the Education Committee and manage one or more activities or assist the Vice President–Education as assigned.
 - Supports AFP SV Annual Campaign as well as AFP Global's annual campaign through a personal contribution
 - Attend regularly scheduled Board meetings and retreats

End Results of Work by the Education Team:

- Chapter members will participate in preparation for the CFRE process
- Fifteen participants or more will benefit from the experiences and counsel provided by mentors

- As appropriate, launch any new programs that are felt to benefit the education needs of the membership
- Education portion of the budget will reflect positive net income due to program fees and fundraising sponsorships

VP Marketing

(Elected Position)

Length of Term: 1 year as VP of Marketing

Average Time Commitment per Month: 20 hrs

General Function of the Position:

The Vice President of Marketing directs the Chapter's efforts in promoting the Chapter, AFP, philanthropy, and the fundraising profession. Starting with a comprehensive Marketing Plan, the VP of Marketing works in a number of ways to effectively market Chapter events to members, non-members, the media, and the general public. All tasks and projects must be completed within the accounting budget established by the AFP Board of Directors each year.

Job Know-How and Principal Activities:

- With support from the VP-Elect of Marketing and marketing volunteers, develops and implements a one-year marketing plan for the Chapter to promote membership and raise the Chapter's visibility and stature in the community.
- Recruits and provides leadership for Chapter Marketing Committee of marketing volunteers.
- Strong experience in marketing and media relations
- Familiarity with (or willingness to learn) Mailchimp, graphic design tools, website structure, social media and content management systems.
- With support from the VP-Elect of Marketing, reviews and approves all marketing and promotional items from other AFP SVC committees.
- Attend regularly scheduled Board meetings and retreats
- Prepares the annual schedule of content assignments for the Chapter's monthly e-newsletter.
- With AFP SVC administrative support, and communication with/from AFP Global, updates and maintains Chapter website.
- Prepares and submits budget estimates for the following year.
- Serves as administrator for the Chapter's LinkedIn and Facebook pages and communities
- Supports AFP SV Annual Campaign as well as AFP Global's annual campaign through a personal contribution

End Results:

- Increased revenue from Career Center job postings at AFP website
- Increased outreach to members and non-members
- Increased visibility in the community for Chapter events and programs
- Increased media coverage about the Chapter, AFP, and philanthropy
- Increased awareness of high ethical standards and professionalism
- Increased awareness of the role of nonprofits in our community

VP-Elect Marketing

(Elected Position)

Length of Term: 1 year as VP-Elect of Marketing, 1 year as VP of Marketing

Average Time Commitment per Month: 10 hours

General Function of the Position:

The VP-Elect of Marketing assists the VP of Marketing in promoting the Chapter, AFP, philanthropy, and the fundraising profession. The VP-Elect assists in a number of ways to effectively market Chapter programs and events to members, non-members, the media, and the general public.

Job Know-How and Principal Activities:

- This job requires strong experience in marketing and media relations, as well as excellent writing skills. It also requires familiarity with word processing software and website structure.
- The VP-Elect of Marketing assists the VP of Marketing in developing and implementing a one-year marketing plan for the Chapter. Activities included are member communications, media coverage, event publicity, membership promotion, and other activities designed to raise the Chapter's visibility and its stature in the community
- With the guidance of the VP of Marketing, the VP-Elect of Marketing assumes primary responsibility for promoting specific Chapter programs and events, i.e., the Mentor Program, Fundraising School in San Jose, the Scholarship Program, the CFRE program, special workshops, etc.
- In addition, the VP-Elect of Marketing assists the Philanthropy Day Committee with production and editing of several publications for Philanthropy Day, including the newspaper insert, press releases, and public service announcements. The VP-Elect of Marketing is responsible for production and editing of the bi-weekly AFP e-Newsletter
- Attend regularly scheduled Board meetings and retreats
- Supports AFP SV Annual Campaign as well as AFP Global's annual campaign through a personal contribution
- Serve as the administrator for Chapter's Facebook and LinkedIn pages.

End Results:

- Increased attendance at events
- Increased membership and outreach to non-members
- Increased awareness of membership benefits

- Increased awareness of CFRE and ACFRE standards
- Increased visibility in the community for Chapter events
- Increased media coverage about the Chapter, AFP, and philanthropy
- Increased awareness of high ethical standards and professionalism
- Increased awareness of the role of nonprofits in our community

VP Membership

(Elected Position)

Length of Term: 1 year as VP of Membership

Average Time Commitment per Month: 12 hours

General Function of the Position:

AFP is the standard-bearer for professionalism in fundraising. The AFP Silicon Valley Chapter is an association of professionals advancing philanthropy by enabling people and organizations to practice ethical and effective fundraising. The VP of membership has overall responsibility for maintaining and/or growing the chapter membership.

Job Know-How and Principal Activities:

- Maintains membership statistics and reports to the Board on a monthly basis; reports membership statistics for the National annual report
- Welcomes new members to the chapter with a personal email
- Encourages Board members to personally greet new members at monthly meetings and other AFP SVC chapter events
- Manages records on lapsed memberships and encourages membership committee members to make calls to past members identified as potential prospects for renewing
- Makes contact with prospective new members and follows up with membership information
- Develops and submits a budget for membership to the treasurer as requested
- Works collaboratively with the IDEA and Marketing Committees to increase chapter membership
- Organizes and chairs monthly Membership Committee meetings
- Maintains a supervisory and working relationship with the Chapter's administrator along with other VP positions
- Attend regularly scheduled Board meetings and retreats
- Assists president of the chapter and other board members with requests for membership related activities
- Oversee Chapter Affinity Groups- recruiting hosts, venues, managing communication to affinity group members

- Supports AFP SV Annual Campaign as well as AFP Global's annual campaign through a personal contribution

End Results:

- Increase membership
- Enhance membership experience/

- Make contact with all new members via phone, e-mail or letter

VP-Elect Membership

(Elected Position)

Length of Term: 1 year as VP-Elect of Membership, 1 year as VP of Membership

Average Time Commitment per Month: 10 hours

General Function of the Position:

The VP-Elect for Membership assists the Membership Vice President by following up on guests who have attended the monthly luncheons, planning and organizing membership mixers, planning and organizing new member orientations, attending monthly membership committee meetings and providing other support as warranted.

Know How And Principal Activities:

- Chapter member in good standing with at least 2 years of membership renewal and acquisition experience
- Performs general functions of the position
- Performs additional duties as delegated by the Membership Vice President. Duties could include, but are not limited to: membership surveys, welcome letters, and donor acquisition strategies
- Budget planning - the VP-Elect of Membership works with other VP-Elects to develop the budget for membership activities in the upcoming year
- Supports AFP SV Annual Campaign as well as AFP Global's annual campaign through a personal contribution
- Attend regularly scheduled Board meetings and retreats

End Results:

- As a direct result of the efforts of the VP-Elect Membership, in cooperation with the Membership Vice President, the number of members for the Chapter will increase.

VP Programs

(Elected Position)

Length of Term: 1 year as VP of Programs

Average Time Commitment per Month: 20-25 hours

General Function of the Position:

The Vice President Program coordinates the selection, recruitment and welcoming of speakers and sponsors, and oversees all aspects of the Chapter's monthly luncheons/membership meetings in order to further education, participation, networking, and activity in AFP, philanthropy and the fundraising profession.

Job Know How and Principal Activities:

This job requires three years' experience in the fundraising field, as well as excellent organization, communication, and people skills. The primary roles and responsibilities include the following principal activities:

- Trains VP Elect of Programs
- Recruits and trains volunteer members of the Program Committee with the help of the board
- Coordinates regular Program Committee meetings and/or calls
- Responsible for proposing and overseeing the annual Program budget
- Identifies speakers who meet the needs of new and seasoned fundraising professionals, working with board members and other interested AFP members to recruit and promote speakers
- Work with Board members and other interested AFP members to recruit and promote speakers
- Ensures that 10-Star requirements are met for programs – including providing advice as needed for programs on Ethics and Diversity.
- Establishes, delegates and oversees tasks required to put on monthly program with members of the Program committee
- With Chapter President and Chapter Administrator, review and negotiate contract for program venue
- Oversee meeting reservations, coordinate caterer and menu for each program in coordination with VP-elect and/or committee members
- Plans at least two workshops during the year (typically the same speaker as at that day's lunch, going more in-depth on a related topic)

- Plans and executes at least two conversations with each speaker and sponsor before their appearances to confirm understanding
- Formally thanks the speaker(s) and sponsor by sending a written thank you letter and copy of feedback after they have presented
- Summarize, and report to the Board and speaker, the evaluation (feedback) form responses.
- Arrange for meeting location, room set-up, special audio-visual needs
- Throughout the year, keep in touch with all future speakers
- Assists with any special training seminars or programs as needed and directed by the Board
- Attend regularly scheduled Board meetings and retreats
- Supports AFP SV Annual Campaign as well as AFP Global's annual campaign through a personal contribution

Responsible for delegating the following tasks:

- Seek sponsorship for each of the programs and coordinate all aspects of the sponsorship such as payment, thank you letter, obtaining logo, set up table, introduce sponsor at luncheon
- Print copies of presentation/handouts (if speaker does not)
- Arrange for Thank You card and acknowledgment gift
- Arrive early to greet speaker and sponsor
- Collect speakers bio and picture in the format specified and prepare a paragraph for the Cvent invitation (% Dawn), article for the newsletter and email flyer to publicize event.
- Determine if other publicity tasks could be undertaken and coordinate their implementation with Marketing Committee

End Results:

- Average attendance at monthly luncheons/membership meetings will be 75 members and/or guests, realizing that monthly targets are impacted by virtual vs. in-person meetings
- A minimum of two national-level speakers will be secured each year
- A minimum of two workshops will be offered to membership

- Programs will provide stimulation and insight into career development
- Meet annual revenue goal

VP-Elect Programs

(Elected Position)

Length of Term: 1 year as VP-Elect of Programs, 1 year as VP of Programs

Average Time Commitment per Month: 8-12 hours

General Function of the Position:

The VP-Elect Program assists the VP Program in coordinating the selection and recruitment of speakers, creating marketing assets for each program, and preparing the venue and catering for each meeting. helps to oversee all aspects of the Chapter's monthly membership meetings in order to further education, participation, and activity in AFP, philanthropy and the fundraising profession. The VP-Elect in consultation with the VP will delegate specific tasks for each program.

Job Know-How and Principal Activities:

This job requires a minimum of two years' experience in fundraising, as well as excellent organization, communication, and people skills. The primary roles and responsibilities include the following principal activities:

- Take the lead to assist the VP in identifying speakers for the following year who meet the needs of new and seasoned fundraising professionals.
- In consultation with the VP Programs, implement the agreed upon specific tasks for each of the monthly meetings
- Work with the VP Marketing to gain significant visibility of and attendance at monthly programs, including obtaining speakers' bios and presentation outline
- Serve as representative on Marketing Committee
- Email descriptions of each speaker and topic to CEN, SVCN, SCU-School of Business, San Jose Business Journal, and any other groups who might include the info in their newsletter.
- Assist the VP – Program in maintaining the budget
- Work with VP and Chapter Administrator to email evaluation/feedback Detailed reports (with attendee names and contact info) to VP's of Membership and Volunteers committee leads
- Arrive early to greet speaker and assist with program set up
- Attend regularly scheduled Board meetings and retreats
- Assist with any special training seminars or programs as needed and directed by the Board,
- Supports AFP SV Annual Campaign as well as AFP Global's annual campaign through a personal

contribution

- The VP-Elect will provide assistance, as needed by the VP Program, for other principal activities listed above

End Results:

- Average attendance at monthly Chapter meetings will be 75 members and/or guests, realizing that monthly targets are impacted by virtual vs. in-person programming
- A minimum of two national-level speakers will be secured each year
- Programs will provide stimulation and insight into career development for AFP membership

Ethics Chair

(Appointed Position)

Length of Term: 1 year as Ethics Chair

Average Time Commitment per Month: 5 hours

General Function of the Position:

The foundation of philanthropy is ethical fundraising, and a key mission of AFP SVC is to advance and foster the highest ethical standards within its membership. The role of the Ethics Chair is to keep the Chapter informed of AFP's Code of Ethical Standards. When opportunities arise, the Ethics Chair brings to the Board suggestions for ethics activities appropriate for members.

Job Know How and Principal Activities:

- This position serves as the Board liaison with AFP Global in regards to updates on fundraising ethics and ethical policies
- The Ethics Chair may also do additional research using resources such as California Association of Nonprofits, Independent Sector, and other advocacy groups via their websites
- Specific activities of the Ethics Chair include: preparing handouts for meetings, submitting copy for e- newsletter articles or email alerts, introducing an ethics moment at Chapter luncheons, and preparing monthly activity reports for the Board
- Leads and coordinates efforts for an annual ethics program (a requirement of the AFP Ten Star Award criteria)
- Attend regularly scheduled Board meetings and retreats
- Supports AFP SV Annual Campaign as well as AFP Global's annual campaign through a personal contribution

End Results:

- The primary result of the work of the Ethics Chair is an informed Chapter membership.
- A possible secondary result is an expanded knowledge and awareness of AFP Silicon Valley with government officials

VP Philanthropy Day

(Elected Position)

Length of Term: 1 year as Silicon Valley Philanthropy Day Chair

Average Time Commitment per Month: 20 hours

General Function of the Position:

Works with AFP SVC Board to set strategic goals and objectives for the Silicon Valley Philanthropy Day luncheon event. Supervises and works with the Event Coordinator (a paid consultant) who is responsible for logistical and administrative activities of the committee.

Job Know How and Principal Activities:

- Works with each AFP SVC Board member to enlist support in selling sponsorships, tickets, ads and vendor tables, in addition generating nominations. Also work with the members whose areas of responsibility intersect with Silicon Valley Philanthropy Day (i.e. Marketing VP, Development VP and Volunteer Coordinator)
- Collaborate with Chapter President and Marketing Committee VP in media negotiations for print, radio/television and social media agreements to promote the event
- Work closely with President to minimize overlap on proposals for event sponsorship
- Define needs and job descriptions for pre-event and day of event volunteers for the Volunteer Coordinator
- Provides clear information for announcements for table tents at each month's Chapter luncheons
- Provides information to the Marketing Committee for slide deck for monthly Chapter luncheons as needed
- With input from AFP SVC President develops list of potential committee members, recruits and coordinates the Silicon Valley Philanthropy Day Committee, which is responsible for three major functions and is composed of six sub-committees: Nominations and Selections Committee, Marketing Committee, Centerpieces, Sponsorships, Ad Sales, and Vendor Showcase Sales Committee. All AFP SVC Board members and Past Presidents are also committee members
- Shepherds the process of determining whether there will be a Glenn George Heart of Philanthropy Award for Silicon Valley Philanthropy Day, working with both the Nominations and Selections Committee and the Board after the Outstanding honorees have been confirmed
- Attend regularly scheduled Board meetings and retreats
- Supports AFP SV Annual Campaign as well as AFP Global's annual campaign through a personal contribution

- Essential to have experience in managing large special events
- Essential to have experience managing support staff and volunteers
- Needs to have budgeting and financial projection/analysis skills and experience
- Beneficial to have experience in soliciting corporate sponsorships
- Beneficial to have marketing skills and experience
- Work closely with the Event Coordinator and the sub-committee chairs to develop a regular communication flow and protocol for communication and reporting.
- Styles and frequency of communication will vary from chair to chair and committee to committee, but establishing defined norms for each committee and the leadership team should be accomplished early in the strategic goal-setting of each annual committee's work

End Results:

- Secure sufficient quantity/quality nominations to ensure that awards will go to truly outstanding recipients
- Reach a minimum luncheon attendance goal
- Secure sufficient advertising dollars to produce a program insert or supplement featured and printed by the event's media sponsor.
- Secure sufficient sponsorship dollars to cover the costs of the event and to provide additional revenue to support core programs of AFP SVC
- Produce a marketing/media plan that incorporates visibility and recognition for the chapter and the international organization as well as for philanthropy and the event itself

VP-Elect Philanthropy Day

(Elected Position)

Length of Term: 1 year as VP-Elect of Philanthropy Day, 1 year as VP of Philanthropy Day

Average Time Commitment per Month: 20 hours

General Function of the Position:

Reporting to the VP Philanthropy Day, works with AFP SVC Board to set strategic goals and objectives for the Silicon Valley Philanthropy Day luncheon event.

Job Know How and Principal Activities:

- Works, in collaboration with the VP Philanthropy Day, with the Event Coordinator (a consultant) who is responsible for logistical and administrative activities of the committee.
- Solicits corporate and foundation sponsorships and advertisements
- Supports VP Philanthropy Day throughout the year of service
- Serves as Chair or Co-chair of at least one of three Philanthropy Day sub committees
- Nominations & Selections
- Marketing
- Sponsorship & Ad Sales
- Attends monthly Silicon Valley Philanthropy Day Lead Committee Meetings, all monthly AFP SVC Board meetings as well as June and November Board retreats. Participates in Chapter Marketing Committee meetings as Silicon Valley Philanthropy Day liaison and other NPD meetings as needed.
- Supports AFP SV Annual Campaign as well as AFP Global's annual campaign through a personal contribution
- Essential to have experience in coordinating large special events
- Needs to have budgeting and financial projection/analysis skills and experience
- Beneficial to have experience in soliciting corporate sponsorships
- Beneficial to have marketing skills and experience with relationship management
- Beneficial to have editing and proofreading skills
- Update database spreadsheet for sponsors

- Cultivate sponsors and donors
- Attend regularly scheduled Board meetings and retreats

End Results:

- Secure sufficient quantity/quality nominations to ensure that awards will go to truly outstanding recipients
- Reach a minimum luncheon attendance goal
- Secure sufficient advertising dollars to produce a program insert or supplement featured and printed by the event's media sponsor
- Secure sufficient sponsorship dollars to cover the costs of the event and to provide additional revenue to support core programs of AFP SVC
- Support a marketing/media plan that incorporates visibility and recognition for the chapter and the international organization as well as for philanthropy and the event itself

Professional Development Scholarship Chair

(Appointed Position)

Length of Term: 1 year as Professional Development Scholarship Chair

Average Time Commitment per Month: 10

Job Know How and Principal Activities:

- Attend regularly scheduled Board meetings and retreats
- Submits monthly report of activities
- Reviews and revises scholarship policy and processes, as needed
- Recruits a volunteer Professional Development Funds Committee
- Encourages board leadership to utilize funds to attend the International conference and leadership training
- Reaches out to prospective scholarship applicants and personally encourage members to apply for scholarships
- Coordinates with IDEA VP and VP Elect to promote retention in the IDEA program year 2+
- Maintains records of all scholarships applied for, accepted and rejected
- Considers new ideas and developments related to scholarship program
- Supports AFP SVC Annual Campaign, as well as AFP Global's "Be the Cause Campaign", with a personal contribution

Process for Major Responsibilities:

- Applications generally arrive through the chapter Website. The Chapter Administrator forwards them to the Chair of Professional Development Funds. All applications are confidential
- Chapter Administrator verifies AFP membership for applicants is current
- The Chair emails confidential applications to committee members for review/approval based on
- applicants meeting scholarship criteria and available funds remaining
- If approved, chair sends personal congratulatory e-mail or letter to applicant informing him or her of the scholarship and, if not already included with application, requesting documentation of either (1) registration and payment of planned educational training, (2) proof of AFP membership for member scholarships which are given only in years one and two, or (3) receipt for having purchased CFRE Study Guide or (4) receipts for travel expenses (Chamberlain Scholar only)
- Chair enters applicant acceptance information into spreadsheet maintained with all information about scholarships submitted and awarded
- The Chair completes a check request for payment of the scholarship, signs and sends to Chapter Administrator for processing
- Chapter Administrator writes check for signature and payment, and retains copies of all applications, check requests and scholarship documentation. Mails check to scholarship winner. Scholarship winners are asked to write a story for the AFP SVC newsletter, or speak at an upcoming Chapter meeting about their experience as a scholar. Speaking must be coordinated with the VP Programs and the newsletter submission must be coordinated with the VP Marketing. All written pieces require editing prior to submission

End Results:

- Members are more aware of scholarship opportunities
- Members are able to take advantage of scholarship funds available
- Members have a positive impression of AFP SVC as a result of scholarship support
- Members renew their AFP SVC membership and volunteer to serve on committees

Young Professional Chair

(Appointed Position)

Length of Term: 1 year as Young Professional Chair

Average Time Commitment per Month: 10 hours

General Function of the Position:

AFP is the standard-bearer for professionalism in fundraising. The AFP Silicon Valley Chapter is an association of professionals advancing philanthropy by enabling people and organizations to practice ethical and effective fundraising. In collaboration with the Vice President for Membership, the Young Professional Chair has overall responsibility for interacting and engaging young professionals in our chapter.

Job Know-How and Principal Activities:

Welcomes new young professionals to the chapter with a personal email and encourages their attendance at events, particularly those tailored to their interests. This group, also known as “millennials” include those individuals born between 1980-2000.

- Establishes and oversees a minimum of two events designed for our young professionals. Events may include a young professional mixer, an educational program, a panel discussion or other activity to encourage our young professionals to further engage in our chapter. These events should be coordinated with other Board Members and their areas of oversight
- Makes contact with prospective new young professional members and follows up with membership information
- Develops and submits a budget to the treasurer as requested
- Recruits a volunteer Young Professionals Committee
- Organizes and chairs monthly Young Professional committee meetings
- Attend regularly scheduled Board meetings and retreats
- Submits monthly report of activities
- Assists president of the chapter with requests for young professional related activities
- May establish a Young Professional Affinity Group in coordination with VP Membership
- Supports AFP SV Annual Campaign as well as AFP Global’s annual campaign through a personal contribution

End Results:

- Increase membership of young professionals and educational and networking opportunities to further engage these members in the Chapter
- Make contact with all new young professional members via phone, e-mail or letter