

# 2026-2028 VOLUNTEER APPLICATION



## BOARD OF DIRECTORS EXPECTATIONS

The Board of Directors shall consist of the following members and **elected** by the membership:

- President
- 1<sup>st</sup> Vice President - Programs Chair
- 2<sup>nd</sup> Vice President – Membership Chair
- Secretary
- Treasurer
- Education Chair
- University Relations Chair
- Public Awareness Chair
- Advocacy Chair

Board members are elected to either **one-year** or **two-year terms**. If a director should resign from the Board prior to his term ending, the remaining Board may appoint a replacement to serve out the resigning member's term.

The Board's function is to act on behalf of the general membership and to establish society policies in accordance with the society's bylaws. In order for the Board to function, the society should have clearly written bylaws, a mission statement and goals, which should be reviewed on a regular basis to ensure completeness, accuracy, relevancy, and consistency. **Board members have three roles:**

1. Set strategic direction: Determine mission/vision/purpose and ensure effective planning
2. Ensure adequate resources: Select staff, financial resources, build a competent board, enhance standing
3. Fiduciary oversight: Support Executive Director, strengthen programs, protect financial assets, ensure legal/ethical integrity

**Board members also have three legal duties:**

- Care: show up prepared and engaged, participate, and pay attention; attend board and committee meetings, exercise independent judgment, review board packets/materials in advance of the meeting.
- Loyalty: loyal to the mission of the organization; adhere to the conflict of interest policy; avoid use of corporate opportunities for personal gain; maintain confidentiality.
- Obedience: comply with regulatory and reporting requirements, governance documents, policies, Board decisions, tax and IRS codes. Stay true to the organization's mission.

Board service is the most demanding volunteer activity. To best serve the board and the organization, follow these tips:

- Accept committee and board assignments with enthusiasm — and then follow through. Use all your professional skills to draft recommendations, carry out tasks, and help the board do its work between meetings.

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- Come to meetings prepared; ask questions when something seems unusual or when you do not understand something.
- Be prepared to respect and learn from different viewpoints on the board while participating in robust discussions to find the best options for the organization.

## EXPECTED COMMITMENTS

Board Members are expected to fulfill the following **duties**:

- At least 5-15 hours per month on average (includes meetings and events, but not special projects if assigned)
- Attend and participate in at least 75% of board meetings
- Attend our major events: Charter Awards Ceremony (Spring), Forecast Dinner (Jan - Feb), Tap Tuesdays events
- Keep a strategic focus with the mission and vision in mind
- Provide fiduciary oversight
- Provide ongoing strategic counsel and advice; responsive to staff
- Serve on and lead board committees
- Provide support for sponsorship efforts
- Engage in nonprofit leadership professional development
- Become familiar with and adhere to Society's bylaws
- Agree to step down from Board position if unable to fulfill these expectations

## BOARD ROLE OVERVIEWS

### President

The society president generally supervises the society. The success of the society depends, in part, on the president's skill as a leader to guide the society in attaining its short-term and long-term objectives. The president has duties and exercises such powers as prescribed in the bylaws, as well as other duties and powers the society's board of directors may prescribe. The president represents the best interests of the society and CFA Institute to advance the profession.

### Programs Chair

The program chair is responsible for selecting, in collaboration with the President and Managing Director, speakers and programming topics and assisting with the planning of other special events (e.g. Wealth Management Symposium, etc.). Programs should add member value by providing continuing education, networking, and career opportunities as well as being a recruitment tool for new members.

### Membership Chair

The objective of the membership chair is to promote the advantages and benefits of membership, to assist potential members through the application process, to respond to membership inquiries, and to manage existing memberships. The chair can also be responsible for promoting membership participation in society programs and events.

### Secretary

The secretary is responsible for maintaining all meeting-related minutes and documentation for board and member distribution.

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## Education Chair

The education chair is responsible for any society initiative related to potential candidates for the CFA® Program, including but not limited to society scholarships, university presentations, and complimentary curriculum orders.

## University Relations Chair

The university relations chair is responsible for any society initiative related to potential candidates for the CFA® Program, including but not limited to society scholarships, university presentations, the CFA Institute Research Challenge, and complimentary curriculum orders.

## Public Awareness Chair

Public relations and advertising can be cost-effective communication tools that help raise the visibility of your society, its members, and/or the CFA® designation. An effective public awareness campaign also builds membership, raises program attendance, and enhances employer interest in supporting society activities.

## Advocacy Chair

The advocacy chair coordinates local advocacy outreach efforts and is the primary communicator of CFA Institute advocacy initiatives—ethics, standards, and policy issues. A primary role of the advocacy chair is to organize and lead a local advocacy committee in the planning and implementation of local advocacy activities, potentially including member education, industry/investor outreach, and/or regulatory policy and research.

**Thank you for your interest in volunteering with CFA Society San Diego!**  
**[Click here](#) to complete and submit your application form.**