Programs Director

The Programs Director is responsible for providing timely and quality continuing education opportunities to chapter members at regular chapter meetings and working with Partners and approving topics for CE Day.

Specific Responsibilities
- Select content, topics and speakers for the Austin chapter meetings with help from the Board.
    - Use prior list of speakers for ideas
    - Get speaker ideas from members (survey)
    - Consider having speakers present during a timely part of the year, ie tax advice
    - Identify top speakers and get them booked. Fed Reserve Speaker
    - University of Texas is a good place to find speakers

- Promotes the Financial Planning Association and chapter mission and purpose.

- Attend monthly board meetings, chapter meetings and chapter activities.

- Ensuring program material is pertinent to all members.

- Development of a budget for the directorship and proposal to the board of directors for approval.

- Management of chapter meeting expenses within the budget approved by the board of directors.

- Responsible for approving Partner Webinar topics

- Communicate speaker info to Chapter Executive for her to gather presentation information, materials and marketing information (see detail of duties)

- Attend monthly board meetings and chapter activities.

- Work with Career Day Chair to explore speaker ideas for Career Day.

Programs Director Detailed Responsibilities

Programs Director
Prep for meeting:
- Develop and plan the programs to be presented at chapter meetings.
- Speakers need to be confirmed as early as possible to allow time for CE approval and marketing
- Serve as main contact for speaker. Communicate with speaker, copying and introducing Chapter Exec on the confirmation email so that she can reach out to the Speaker to gather information (Chapter Exec doesn't need to be copied on all emails with speaker). Chapter Exec will then email speaker to gather necessary info.
- Touch base with Speaker week prior to Event to confirm date, time, location.
    - Let speaker know that guests begin to arrive at 11:30 so they should get there a few minutes before to test audio.
    - Meeting starts around 11:45 with speaker going on after announcements so around noon.

- Talk should be 40-45 minutes followed by questions. Attendees like to be out of meeting by 1:00.
- Make sure that we have their Presentation by the day before the Lunch at the latest. Have them send to you and you put in DropBox under the specific Lunch Meeting for Sarah to download on computer.

At meeting:
- Arrive early to meeting to greet speaker and test presentation and mic (Have speaker test out for clarity. The ACC banquet captain will assist you with AV needs.)
- Manage Sponsor/Announcement Slide Show, Sponsor's slides and Speaker's Presentation during meeting.
- Introduce Speaker-obtain necessary bio from Speaker if has not already been acquired by Chapter Exec. Check Dropbox to see if has been obtained.

Chapter Executive Responsibilities as relates to Programs Chair:
- Works with venue
- Sends Speaker Checklist to speaker to obtain necessary info
- Once Speaker Checklist is received, will put this in Dropbox
- Sends write up to CFP Board for CE approval
- Posts meeting info on website
- Sets up website and constant contact for reservations
- Sends out emails and handles registrations
- Brings laptop with the following items pre-loaded: Sponsor/Announcements Slideshow, Sponsor Presentation (if there is one), and Speaker's Presentation

At meeting:
- Manages registration table at lunch

After meeting

- Submits CE attendee list to CFP Board
- Sends post-meeting survey

Updated 2/2022