

# The AAll Chapter Program Chair

The AAll Program Chair is a volunteer board position responsible for organizing educational programs and ensuring speakers and venues contribute to the chapter's objectives. Essential requirements include being an AAll member and actively participating in chapter activities.

## Main Requirements

- Must be a current AAll member
- Should be able to recruit and coordinate with speakers for chapter meetings and special interest events
- Requires strong organizational, communication, and collaborative skills for working within the board and chapter community

## Core Tasks

- Procure venues and arrange logistics for chapter meetings and presentations.
- Recruit and schedule speakers or program content for regular meetings, often focusing on investing topics or financial education.
- Coordinate with other chapter leaders, including the President, Treasurer, and Communications Director for event planning and membership engagement.
- Communicate with chapter members about upcoming programs, events, and opportunities to participate.
- Promote chapter activities, encourage participation, and support active engagement in AAll's mission and events.

## Notes

- Program Chairs often have the opportunity to shape the chapter's educational offerings by sourcing high-quality speakers and relevant topics for members.
- Effective Program Chairs help sustain chapter vitality and foster community among individual investors by encouraging attendance, knowledge-sharing, and involvement in chapter governance and volunteer activities.

## Specific Duties

- Determine topics and speakers of interest to the chapter, using sources such as:
  - Chapter survey results
  - Special interest groups
  - Member feedback
  - Other AAll chapters
  - Chapter board members

- Identify and evaluate potential speakers using the AAll Chapter Meeting Record (CMR), online research, and other relevant resources.
- Send formal invitations to selected speakers for specific chapter meeting dates.
- Maintain and regularly update the RTP Chapter Program Calendar.
- Confirm program details and meeting logistics with each speaker.
- Add confirmed programs to the National AAll CMR.
- Provide each speaker with National AAll speaker guidelines and an overview of the Research Triangle chapter.
- Request and obtain from each speaker:
  - Professional biography and Photo
  - Presentation title
  - One- or two-paragraph presentation description and two – four talking points
  - Contact information
- Contact the speaker prior to the meeting to confirm meeting details, lunch, travel arrangements, etc.
- During the meeting:
  - Introduce the speaker
  - Monitor and moderate virtual attendee questions
  - Thank the speaker and announce next month's presenter
- Record the count of both in-person and virtual attendees.
- Send a thank-you note to the speaker and extend an invitation for potential future participation.
- Update the AAll CMR with attendee numbers and a program review.
- Conduct a periodic review of past programs to assess their value to members and determine future presentation interest.

## **Where to Find Training and Help**

- Members of the chapter's board are eager to help you in this role.
- AAll provides training modules through the Leadership Academy Program that cover the expected duties and procedures that should be followed including
  - Module 5 — Chapter Speaker, and
  - Module 11 — Chapter Meeting Record and Community.
- Join the Communities of other successful AAll chapters: San Diego, Los Angeles, Portland, Phoenix, NYC, and Austin to learn about their programs. Reach out to their Program Chairs
- Reach out to members of AAll's Chapter Leader Executive Committee (CLEC) made up of fellow leaders of other chapters
- Make use of AAll's Speaker Database, which the Chapter Leader Executive Committee (CLEC) is updating