

# CALSHRM VOLUNTEER POSITION DESCRIPTIONS TABLE OF CONTENTS

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## OFFICERS

### PRESIDENT/STATE DIRECTOR

#### **Function:**

Serves as the highest elected official of the California State Council of SHRM. Provides leadership and communication to further the Society's goals and objectives between existing and future SHRM members and SHRM professional and student chapters. Promotes collaboration between the Chapter leaders, the Core Leadership Area Directors (CLA's) and District Directors. Serves as a voting member of the CalSHRM State Council (State Council) and member of the Executive Committee.

#### **Reports to:**

- The Executive Committee
- The State Council
- SHRM Leadership
- Oversight provided by the CalSHRM Continuity Committee

#### **Competencies:**

- Demonstrated competency in all 9 SHRM Behavioral Competencies
- Proficiency in leading, managing and directing a non-profit corporation.

#### **Responsibilities:**

- Manages the affairs of the State Council.
- Leads the strategic planning process annually ensuring that in the fourth quarter of each year the following year's goals are established and published.
- Participates as the State Representative on the SHRM Regional Council and provides input to the SHRM MAC representative.
- Provides leadership for the State Council by:
  - Assigning responsibility for achieving state and SHRM objectives.
  - Directing the activities, plans and objectives of the State Council.
  - Evaluating the performance of all appointed and elected council members and taking appropriate action when required to either encourage the continued participation or removal from duties.
- Oversees the submission of all the forms and required documents for the Regional SHRM representatives and SHRM as required.
- Serves as the signatory on the bank account which requires two signatures.
- Promotes SHRM membership among practicing members of the human resource profession by making personal appearances and speaking engagements before SHRM Chapters and other organizations.

- Identifies individuals who demonstrate effective leadership roles within his/her district for potential leadership involvement on the council.
- Assists the State Council in the dissemination or development of information, providing timely and accurate responses to proposals, surveys, and questionnaires.
- Recommends policy changes as warranted.
- Identifies and assists in the development of new SHRM professional chapters through the affiliation of existing human resource organizations and other interested human resource groups.
- Works with CalSHRM Board members to incorporate state and SHRM goals into local chapter activities. Promotes and encourages local chapter involvement in the SHRM professional and student chapter merit award program.

#### **Requirements:**

- Must be a SHRM member in good standing. SHRM-SCP or SHRM-CP required.
- Must be a member of a local California SHRM chapter.
- Prior board service at the chapter level required.
- Prior CLA experience or other State Council board experience required.
- Nominated by the Continuity Committee and elected to serve a two-year term beginning the first day of January and ending the last day of December under CalSHRM Bylaws. If appointed to fill a vacant term, they may run for election for up to two additional terms.

#### **Goals:**

State Director in conjunction with the full Council develops the organization strategy for the two-year term they serve.

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## **STATE DIRECTOR-ELECT**

#### **Function:**

Serves as an “alternate” to the CalSHRM State Council Director (State Director). Works with the State Director to establish policy, develop strategies and objectives consistent with SHRM Board policies. Provides guidance to elected and volunteer staff who are responsible for accomplishing state and SHRM objectives. Serves as a voting member of the CalSHRM State Council Board of Directors and on the Executive Committee.

#### **Reports To:**

The State Council Director

#### **Competencies:**

- Demonstrated competency in all 9 SHRM Behavioral Competencies
- Proficiency in leading, managing and directing a non-profit corporation.

#### **Responsibilities:**

- In the absence of the State Director, manages the affairs of the CalSHRM State Council (State Council).
- Oversees the activities of the District Directors, encouraging collaboration and consistency in the approach across the state to chapter engagement and information sharing.
- Promotes the State Council and the profession by personal appearances and speaking engagements before SHRM chapters and other organizations within the state.
- Works with the Secretary and Treasurer to ensure accuracy of the minutes, financial reports, and other important records for the State Council.
- Responds to emails in the President Elects CalSHRM mailbox within three business days.
- Works with the State Director and State Council representatives to ensure state initiatives are on track.
- Develops a strategy for succession planning, participates on the nominating committee.
- Participates as a state representative as required for SHRM Regional Council meetings, when called upon to do so.
- Serves as signatory on the bank account.

#### **Requirements:**

- Must be a SHRM member in good standing. HR Certification required. desirable.
- Must be a member of a local chapter.
- Prior experience with the state council as a chapter president, Core Leadership Area Directors and/or Executive Committee member required.
- Nominated by the Continuity Committee and elected to serve a two-year term beginning the first day of January and ending the last day of December under CalSHRM Bylaws. If appointed to fill a vacant term, they may run for election for up to two additional terms.

#### **Goals:**

- Work with District Directors to develop goals on approved organizational strategy and provide coaching for District Directors to develop Core Leadership Director goals.

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## **STATE SECRETARY/COMMUNICATIONS DIRECTOR**

#### **Function:**

Prepares the proceedings of all CalSHRM State Council meetings, takes minutes, and maintains the records. Distributes and posts meeting minutes in a timely manner following all board interactions. Serves as a voting member of the CalSHRM State Council Board of Directors and member of the Executive Committee.

#### **Reports To:**

The State Council Director

#### **Competencies:**

- Demonstrated competency in all 9 SHRM Behavioral Competencies
- Familiarity with and working knowledge of Roberts Rules of Order

### **Responsibilities:**

- Prepares and distributes meeting announcements and a draft agenda; compiles materials for presentations; prepares follow-up material, ensures records accurately reflect business matters and prepares reports associated with CalSHRM State Council (State Council) meetings and activities.
- Prepares minutes of State Council meetings and ensures appropriate distribution including copies to other State Council members and the SHRM Regional Team in a timely manner.
- Recommends new policies and procedures to increase organizational effectiveness.
- Support adherence to the agenda and timeframes by monitoring the time allotted for each agenda item during the State Council meetings.
- Provides Corporate Governance and oversight working with the Continuity Committee. Maintains the CalSHRM Bylaws and distributes bylaws revisions and updates as required.
- Reviews ACTION ITEMS prior to each State Council meeting and follows-up with owners to ensure the items are acted upon and can be reported at the next meeting of the State Council.
- Collaborating with the Executive Committee, established the guidelines and process for communicating with the current State Council Board Members.
- Coordinates all At Large e-blasts to ensure utilize of the allotted number of e-blasts per year.
- Monitor and respond to your CalSHRM emails within three business days. Review the CalSHRM inbox for information received to ensure timely responses to questions or requests.
- Performs other duties as assigned by the State Director.

### **Requirements:**

- Must be a SHRM member in good standing. SHRM Certification is highly desirable.
- Must be a member of a local chapter.
- Prior board service at the chapter level highly desirable.
- Nominated by the Continuity Committee and elected to serve a two-year term beginning the first day of January and ending the last day of December under CalSHRM Bylaws. If appointed to fill a vacant term, they may run for election for up to two additional terms.

### **Goals:**

- Work with Core Leadership Areas (CLAs) and District Directors to document and have notes of their projects and actions throughout their term.
- Works with the State Director Elect on sustainability goals.

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## **STATE TREASURER**

### **Function:**

Prepares the financial records for the CalSHRM State Council (State Council) including leading budgeting discussions to present information to the Executive Committee and the CalSHRM State Council for approval. Monitors trends and predicts needs to ensure a sustainable future for CalSHRM. Ensures that financial accountings and records are

delivered to the Council 5 business days before each council meeting for review and discussion. Serves as a voting member of the CalSHRM State Council Board of Directors and member of the Executive Committee.

**Reports To:**

The State Council Director

**Competencies:**

Demonstrated competency in all 9 SHRM Behavioral Competencies

**Responsibilities:**

- Prepares quarterly financial reports and presents at the CalSHRM State Council meetings and posts reports to the CalSHRM shared drive.
- Leverages technology and identifies a process to track registrations, income, and expenses for the CalSHRM State Council.
- Maintains all financial records of the State Council required by law or SHRM.
- Prepares, interprets, and disseminates periodic financial status reports for approval by the State Council.
- Prepares the annual budget of revenue and expenses and submits same for State Council approval at its first meeting each year.
- Receives, holds, and safeguards in the capacity of trustee and financial agent, all funds for the State Council. Disburses such funds only for normal and usual uses unless the State Council otherwise directs.
- Reviews the State Council's accounting and record keeping policies and procedures. Recommends or implements changes as indicated to protect and ensure the financial health of CalSHRM.
- Administers the electronic payment system and replies to submitted requisitions within five business days.
- Responds to your emails in the CalSHRM inbox within 48 hours.
- Is a Signatory on the CalSHRM bank accounts.
- Performs other duties as assigned by the State Council Director.

**Requirements:**

- Must be a SHRM member in good standing. HR Certification is highly desirable.
- Must be a member of a local chapter.
- Preferable for candidate to have experience in Finance and Accounting.
- Prior board service at the chapter level highly desirable.
- Nominated by the Continuity Committee and elected to serve a two-year term beginning the first day of January and ending the last day of December under CalSHRM Bylaws. If appointed to fill a vacant term, they may run for election for up to two additional terms.

**Goals:**

- Financial reports (Balance Sheet, Income Statement (P&L), Cash Flow and Budget to Actual, provided on a monthly, quarterly, and annual basis.
  - Monthly financial reports due by the 20<sup>th</sup> of the following month
  - Quarterly financial reports due by the 20<sup>th</sup> of the month following the calendar quarter.

- Annual financial reports due by the 20<sup>th</sup> of January each year.
- Business expense reimbursements processed within 15 days of submission.
- Timely A/R and A/P Processing with no late fees or past due notices.

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## IMMEDIATE PAST STATE DIRECTOR

### **Function:**

Provides guidance and mentorship to the State Director and ensures continuity of purpose for CalSHRM State Council (State Council). Works with the State Council Director to establish policy, and strategic objectives consistent with SHRM Board policies. Provides guidance to elected and volunteer staff who are responsible for accomplishing state and SHRM objectives. Serves as a voting member of the CalSHRM State Council Board of Directors and member on the Executive Committee.

### **Reports To:**

The State Council Director

### **Competencies:**

Demonstrated competency in all 9 SHRM Behavioral Competencies

### **Responsibilities:**

- Promotes the State Council and the profession by personal appearances and speaking engagements before SHRM chapters and other organizations within the state.
- Works with the State Director and State Council representatives to ensure state initiatives are on track and that the team as a whole is collaborating and communicating effectively.
- Assists in developing a strategy for succession planning, participates as the Chair for the State Council Nominating Committee.
- Participates as a state representative as required for SHRM Regional Council meetings, when called upon to do so.
- Serves as signatory on the bank account depending on individual expertise, may serve as the Chair for Annual California Legislative and HR Conference.

### **Requirements:**

- Must be a SHRM member in good standing. HR Certification is highly desirable.
- Must be a member of a local chapter.
- Prior experience with the State Council as a chapter president, Core Leadership Area Director (CLA's) and/or Executive Committee member highly desirable.
- Automatically appointed to the position after completing successful service as elected State Director unless they resign, in which case the position remains vacant for the 2-year term.

### **Goals:**

- Goals and objectives are developed and implemented under the State Director’s strategic plan after elections in Q4 each year.

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## STATE DISTRICT DIRECTOR

### **Function:**

Serves as a CalSHRM State Council voting member of a designated geographical area within the state. Is the primary point of contact and liaison with SHRM affiliate chapters in their district and CLA Directors on the board to provide leadership support, resources, communication, and solutions to further SHRM and CalSHRM’s goals and objectives. Serves as a member of the California State Council Executive Committee and member on the Executive Committee.

### **Reports To:**

- The Executive Committee
- The CalSHRM State Council

### **Competencies:**

Demonstrated competency in all 9 SHRM Behavioral Competencies

### **Responsibilities:**

- Is expected to attend and participate in all meetings of the State Council either in person or virtually.
- Promotes SHRM and Chapter membership among practicing members of the human resource profession.
- Identifies individuals who demonstrate effective leadership roles within the district for potential leadership involvement on the State Council.
- Assists the State Council in the dissemination or development of information, providing timely and accurate responses to proposals, surveys, and questionnaires.
- Recommends policy changes as warranted.
- Communicates and supports each chapter in their assigned region sharing information, coordinating CLA support, and best practices to help chapters build a sustainable future.
- Immediately report to the Executive Committee any issues that may lead to disenfranchisement of a chapter or any issues of disengagement that are identified.
- Immediately reports to the Executive Committee, any issues of disengagement or lack of service and support by CLA directors on the board.
- Develops recognition tools within their region to recognize best practices and share information with the State Council.
- Provides direction, assistance to and support of professional development activities within the state and SHRM.
- Develops and facilitates two-way communications between local SHRM chapters and the state council. Maintains contact with assigned chapters and attends chapter meetings and local board meetings as time and finances allow.



- Collaborates with the Core Leadership Area Directors (CLA's) to identify needs and build products to be shared with Chapters across the state.
- Identifies and assists in the development of new SHRM professional chapters through the affiliation of existing human resource organizations and other interested human resource groups.
- Ensures that Chapters in their assigned region submit the CLIF and SHAPE Annual Reports due to SHRM about chapter leaders and their annual plans.
- Works with chapter leaders to incorporate State Council and SHRM goals into local chapter activities as appropriate. Promotes and encourages local chapter involvement in the SHRM professional and student chapter merit award program.
- Ensure that the Chapter leaders are introduced to the CLA's on the council and other council resources available to them.
- Works with other District Directors to build and present a Volunteer Leader Orientation Program to be held annually at the beginning of each calendar year to help new board members become familiar with the State Council and all the resources available to them through CalSHRM and SHRM.
- Connects with sponsors to offset the costs of the annual CalSHRM Volunteer Leader Orientation program.
- May also be called upon to assist with other State Council duties as required.

#### **Requirements:**

- Must be a SHRM member in good standing. SHRM-SCP, or SHRM-CP is highly desirable.
- Must be a member of a local chapter.
- Prior board service at the chapter level highly desirable.
- Prior CLA experience highly desirable.
- Nominated by the Continuity Committee and elected to serve a two-year term beginning the first day of January and ending the last day of December under CalSHRM Bylaws. If appointed to fill a vacant term, they may run for election for up to two additional terms.

#### **Goals:**

- Goals and objectives are developed and implemented under the State Director's strategic plan after elections in Q4 each year.

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## CORE LEADERSHIP DIRECTORS

### STATE MEMBERSHIP DIRECTOR

#### **Function:**

Provide leadership to membership activities in chapters, particularly assuring that chapter membership directors have access to resources necessary to recruit at-large SHRM members to chapters, local chapter members only (LMOs) to SHRM, and non-affiliated HR professionals to both organizations for dual membership. Provide leadership to member engagement/retention measurement and strategies of chapters. Serves as a voting member of the CalSHRM State Council Board of Directors.

#### **Reports To:**

- State Director
- Executive Committee (District Directors)

#### **Competencies:**

- Demonstrated competency in all 9 SHRM Behavioral Competencies
- SHRM BASK Competent

#### **Responsibilities:**

- Provide leadership to chapter membership directors engaging them in a Membership Council with regularly scheduled conference calls.
- Assure that chapter membership directors have access to best available resources for member recruitment and retention.
- Track, analyze and report to the State Council the statewide and chapter membership growth and other relevant membership data (e.g., demographic data on members) such as:
  - At-large members recruited to chapters
  - Local members only recruited to SHRM.
  - Non-affiliated professionals recruited to both organizations.
  - Engagement/retention of current chapter members
- Author articles regarding membership best practices for the CalSHRM website, e-blasts, and newsletter; at least one article per quarter that can be utilized for all three.
- Provide forum – e.g., state council meetings, conference calls – for chapter membership directors to discuss membership issues and share successful recruiting/retention practices and initiatives.
- Serve as resource for chapters struggling to meet minimum standards of SHRM affiliated membership to assure that chapters are not disaffiliated for not meeting this requirement.

- Encourage uniform membership requirements for all chapters based on the SHRM model for membership qualifications.
- Participates in the SHRM Membership webcasts on behalf of the State Council to stay current on SHRM membership information and best practices.
- Work with the Executive Committee to set the membership goals for the State and to establish forms of recognition for chapters who meet their goals.
- Work with the Executive Committee to craft an engagement outreach program to SHRM at-large members in the state.
- Collaborate with the other District Directors and Core Leadership Area Directors to identify membership strategies available in their areas.
- Encourage Chapter participation in the membership promotional programs as available thru SHRM, CalSHRM and Global SHRM Conferences.
- Attendance at all quarterly State Council meetings is expected either in person or virtually.
- Respond to your emails in the CalSHRM inbox within three business days.
- Assists with other duties as requested or assigned to support the CalSHRM State Council.

#### **Requirements:**

- Must be a SHRM member in good standing. HR Certification is highly desirable.
- Must be a member of a local chapter.
- Prior board service with a SHRM chapter (California preferred) or SHRM Council highly desirable.
- Nominated by the Continuity Committee and elected to serve a two-year term beginning the first day of January and ending the last day of December under CalSHRM Bylaws. If appointed to fill a vacant term, they may run for election for up to two additional terms.

#### **Goals:**

- Goals and objectives are developed and implemented under the State Director's strategic plan after elections in Q4 each year.

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## **STATE DIVERSITY, EQUITY, INCLUSION, & BELONGING DIRECTOR**

#### **Function:**

This position continuously monitors and evaluates activities state-wide addressing the broad spectrum of diversity, equity, inclusion and belonging (DEIB) issues impacting HR professionals. Plans and encourages state council involvement and activities impacting the DEIB arena based on identified needs. Presents periodic reports or updates to the state council director and fellow state council members. Works in collaboration with chapter DEIB directors/advocates. Serves as a voting member of the CalSHRM State Council Board of Directors.

#### **Reports To:**

- The Executive Management Committee
- District Directors

**Competencies:**

- Demonstrated competency in all 9 SHRM Behavioral Competencies
- SHRM BASK Competent

**Responsibilities:**

- Serve as advocate and program coordinator for DEIB activities across the state.
- Partner with chapters, schools, business entities and other non-SHRM DEIB coordinators to share information and discuss potential initiatives and partnerships.
- Identify and evaluate issues that impact DEIB and develop goals for the state council's DEIB strategy.
- Report on DEIB issues to the state council and serve as advocate for DEIB activities and events.
- Serve as a resource and provides leadership to the state council and chapters on DEIB issues.
- Monitor activities concerning DEIB across the state and provide timely information to the state council and chapter DEIB directors.
- Work in close cooperation with chapter DEIB directors.
- Develop and support workshops and seminars that address DEIB issues.
- Provide special recognition for programs that promote betterment of DEIB efforts in the state.
- Respond to any other requirements of the state council director.
- Participate in SHRM DEIB Core Leadership Area volunteer leader conference calls and webcasts.
- Participate in the development and implementation of short-term and long-term strategic planning for the council.
- Represent the state council in the human resources community.
- Attending all state council meetings either in person or virtually as applicable.
- Possess business acumen regarding the tax and legal implications of different fund-raising activities and who to reach out to at National SHRM for more information and best practice sharing.
- Upon completion of the position's term, assist the incoming DEIB Director to assure a smooth transition of responsibilities and continuity of knowledge and resources.

**Requirements:**

- Must be a SHRM member in good standing. SHRM Certification is highly desirable.
- Inclusive Workplace Culture Digital Badge is a plus.
- Prior board service with a SHRM chapter (California preferred) or SHRM Council highly desirable.
- Nominated by the Continuity Committee and elected by the membership of the State Council. Serves a two-year term beginning the first of January and ending the last day of December each year. May be nominated and elected to serve up to one additional two-year term. If appointed to fill a vacant term, they may run for election for up to two additional terms.

**Goals:**

CalSHRM goals are established after successful election or appointment.

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## STATE EDUCATION PROGRAMS/SHRM CERTIFICATIONS DIRECTOR

### **Function:**

Provide oversight to professional staff engaged by the CalSHRM State Council (State Council) to ensure that education and certification classes are built and managed to meet the requirements of SHRM and CalSHRM standards. Maintains a speakers list for Chapters' use to provide speaking resources for conferences and chapter meetings. Works with the CalSHRM Conference Director to deliver education courses in conjunction with the CalSHRM conference and that programs receive PDC's and Bar Associations Recertification credits as appropriate. Promotes SHRM Education and Certification activities for the State Council, SHRM affiliated chapters and their members. Serves as a voting member of the CalSHRM State Council Board of Directors.

### **Reports To:**

- The Executive Management Committee
- District Directors

### **Competencies:**

- Demonstrated competency in all 9 SHRM Behavioral Competencies
- SHRM BASK Competent
- Effectively promote and educate Chapter Leadership on the benefits of Certification and SHRM Education Courses

### **Responsibilities:**

- Works in partnership with the State Council, SHRM affiliated chapters in the state, and SHRM Staff including SHRM Certification Relations Specialist, Education Department, Field Services Director (FSD), Divisional Director, Executive Director (SHRM NorCal), and Holmes Corporation, to establish state-wide education, certification and recertification events achieving successful revenue outcomes for CalSHRM.
- Serve as SHRM Recertification Provider point of contact for the State Council account. Secures PDC's from SHRM for all programs and maintains the State's SHRM Certified Provider status.
- Acts as an advisor and resource for California SHRM Chapters, Chapter Certification Leaders, Program Directors, and their members on matters of Professional Development, Education and Certification.
- Coordinates CA State Legislative Conference speakers including, securing speakers, collecting speaker bios, program information, securing SHRM Credits and Bar Association Credits and sending speaker confirmation and thank you letters.
- Facilitates speaker and program arrangements for State Council Meetings as needed.
- Provides support and direction to Chapter Certification and Education program leaders regarding SHRM Certification and credential programs including the dissemination of participant materials, logins, and correspondence.
- Participates in quarterly SHRM Certification Core Leadership Area webcasts and disseminates information to State Council members and Chapter leaders.
- Encourages the SHRM certification and credentialing of State Council members. Communicates SHRM professional development opportunities to State Council Members.

- Utilize the SHRM Certification, Recertification, and Education Credential presentations for affiliates, and report outcomes back to CalSHRM for disclosure to SHRM staff annually. (The presentation templates are available on the Volunteer Leaders' Resource Center (VLRC): <https://community.shrm.org/vlrc/home>.)
- Reports to the District Directors on a regular basis concerning chapter engagement and activities promoting SHRM Certification and Education Credentials throughout the state.
- Encourages chapter and community participation in CalSHRM Education Series MOU for revenue generation.
- Develops communication programs in and about SHRM Certification and Education Programs (e.g., topical, process, recertification, issues, etc.)
- Performs other duties as assigned by the State Director.

### **Requirements:**

- Must be a SHRM National and local Chapter member in good standing and must be certified as a SHRM-CP or SHRM-SCP.
- Attendance and participation in all meetings of the State Council is required either in person or virtually.
- Nominated by the Continuity Committee and elected to serve a two-year term beginning the first day of January and ending the last day of December under CalSHRM Bylaws. If appointed to fill a vacant term, they may run for election for up to two additional terms.

### **Goals:**

CalSHRM goals are established after successful election or appointment.

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## **STATE GOVERNMENT AFFAIRS DIRECTOR**

### **Function:**

Working with the SHRM Regional Leadership Team and National Advocacy team coordinates CalSHRM information sharing and interactions with the State Legislature.

Monitors and evaluates, on a continuing basis, pending federal, state, and local legislative, regulatory, and legal activities that may have an impact on the management of human resources. Communicates SHRM legislative affairs policies and goals to SHRM chapters and members within the state. Works in close cooperation with the SHRM Government Affairs Team, especially the Senior Advisor for State Affairs, in conducting these tasks. Serves as a voting member of the CalSHRM State Council Board of Directors.

### **Reports To:**

- The Executive Management Committee
- District Directors

### **Competencies:**

- Demonstrated competency in all 9 SHRM Behavioral Competencies
- SHRM BASK Competent

- High proficiency of CA employment law and state legislative process knowledge.

### **Responsibilities:**

- Coordinate with the SHRM Regional Advocacy team and partner with SHRM Governmental Affairs on Advocacy programs.
- Attends the SHRM Employment Law and Legislative Conference and participates/organizes the attendee delegation in the Capitol Hill Advocacy Day.
- Works in close cooperation with SHRM Government Affairs Staff, SHRM's California Lobbyist, and all chapter and community legislative affairs leaders.
- Identifies, evaluates, and disseminates chapters with state issues of concern arising from potential legislation, regulatory and/or legal activities within the state which would potentially impact SHRM members or the profession.
- Provides monthly Legislative Updates to the State Council for publication and creates information to be distributed to the Chapters and available for members on the website.
- Participates in at least one SHRM Legislative webcast.
- Build and administer a recognition program for Chapters, based on their advocacy and legislative activities.
- Be a Chapter resource as a speaker or by sharing information as requested.
- Active promotion of SHRM's Advocacy Team (A-Team) to members through recruitment and coordination of a state contact list of SHRM members who are willing to serve as members to the A-Team.
- Support A-Team members in activities that include, but are not limited to, providing unique personal accounts on specific pieces of legislation to SHRM or for federal or state congressional use, serving as an "expert" resource/speaker for SHRM on a particular issue and testifying before either Congress or their state legislature.
- Provides templates and promotes "How to" sessions on writing their member of congress and how to use the SHRM "Legal Issues and Public Policy" on the SHRM website.
- Encourages and organizes state letter-writing initiatives/competitions to federal and state legislators on pending issues and/or legislation or HR "hot topics."
- May assist in the development of position papers, responses to legislative and regulatory offices, etc. May initiate actions responding to these matters within the state after coordination with the SHRM Senior Advisor, State Affairs.
- Works to develop relationships with business coalitions and other policy-making members or interest groups with shared interests in the legislative community.
- Develops and maintains contact with both state legislators and members of US Congress.
- In coordination with SHRM staff, initiates action in response to legislation regarding regulatory or legal activities in the state.
- Performs other duties as assigned by the State Director.

### **Requirements:**

- Must be a SHRM member in good standing. HR Certification is highly desirable.
- Must be a member of a local chapter.
- Prior board service at the chapter level highly desirable

- Nominated by the Continuity Committee and elected to serve a two-year term beginning the first day of January and ending the last day of December under CalSHRM Bylaws. If appointed to fill a vacant term, they may run for election for up to two additional terms.

### **Goals:**

- Keep Chapter's across the state apprised of legislative activity that may impact business and encourage advocacy in each of the chapters in California by working through CLA's and District Directors to cascade information to chapter leaders.

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## **STATE SHRM FOUNDATION DIRECTOR**

### **Function:**

Educate, promote, and represent the interests of the SHRM Foundation and its activities on the State Council. Serves as a voting member of the CalSHRM State Council Board of Directors.

### **Reports To:**

The State Council Director

### **Competencies:**

- Analytical Aptitude
- Leadership & Navigation
- Consultation
- Communication
- Diversity, Equity & Inclusion
- Relationship Management

### **Responsibilities:**

- Full familiarity with the SHRM Foundation, its products and benefits for members and chapters.
- Monthly and quarterly effective and dynamic communication to state Chapters and Council
- Developing and maintaining a strong network for sharing and building strategic SHRM Foundation strategic goals
- Skilled at financial management for 501c3 and c6 non-profit organizations.
- Educate the chapters and the state council regarding the purpose and ongoing activities of the SHRM Foundation including the Foundation's newest education resources, the status of the annual campaign and upcoming deadlines and events.
- Collaborate with the District Directors and other Core Leadership Areas – (CLA) to create synergies where possible especially with regard to the scholarships available for chapters and members and communicating other SHRM Foundation messages.
- Encourage the chapter membership to contribute financially to the SHRM Foundation as a show of support for the human resources profession.



- Encourage the State Council membership to support the Council's annual contribution to the SHRM Foundation.

### **Requirements:**

- Must be a SHRM member in good standing. HR Certification is highly desirable.
- Must be a member of a local chapter.
- Prior board service at the chapter level highly desirable
- Nominated by the Continuity Committee and elected to serve a two-year term beginning the first day of January and ending the last day of December under CalSHRM Bylaws. If appointed to fill a vacant term, they may run for election for up to two additional terms.

### **Goals:**

CalSHRM goals are established after successful election or appointment.

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## **STATE WORKFORCE READINESS DIRECTOR**

### **Function:**

This position continuously monitors and evaluates activities state-wide addressing the broad spectrum of workforce readiness issues impacting both students and other untapped labor pools. Plans and encourages state council involvement and activities impacting the workforce readiness arena based on identified needs. Presents periodic reports or updates to the state council director and fellow state council members. Works in collaboration with chapter workforce readiness directors/advocates. Serves as a voting member of the CalSHRM State Council Board of Directors.

### **Reports To:**

- The State Council Director
- Members of the State Council and Chapters

### **Responsibilities:**

- Serve as advocate and program coordinator for workforce readiness activities across the state.
- Partner with chapters, schools, business entities and other non-SHRM workforce readiness coordinators to share information and discuss potential initiatives and partnerships.
- Identify and evaluate issues that impact workforce readiness and develop goals for the state council's workforce readiness strategy.
- Report on workforce readiness issues to the state council and serve as advocate for workforce readiness activities and events.
- Serve as a resource and provides leadership to the state council and chapters on workforce readiness issues.
- Monitor activities concerning workforce readiness across the state and provide timely information to the state council and chapter workforce readiness directors.
- Work in close cooperation with chapter workforce readiness directors.

- Develop and support workshops and seminars that address workforce readiness issues.
- Provide special recognition for programs that promote betterment of workforce readiness efforts in the state.
- Respond to any other requirements of the state council director.
- Participate in SHRM Workforce Readiness Core Leadership Area volunteer leader conference calls and webcasts.
- Participate in the development and implementation of short-term and long-term strategic planning for the council.
- Represent the state council in the human resources community.
- Attending all state council meetings as applicable.
- Possess business acumen regarding the tax and legal implications of different fund-raising activities and who to reach out to at National SHRM for more information and best practice sharing.
- Upon completion of the position's term, assist the incoming SHRM Foundation Director to assure a smooth transition of responsibilities and continuity of knowledge and resources.

#### **Requirements:**

- Must be a SHRM member in good standing. SHRM Certification is highly desirable.
- Prior board service with a SHRM chapter (California preferred) or SHRM Council highly desirable.
- Nominated by the Continuity Committee and elected to serve a two-year term beginning the first day of January and ending the last day of December under CalSHRM Bylaws. If appointed to fill a vacant term, they may run for election for up to two additional terms.

#### **Goals:**

CalSHRM goals are established after successful election or appointment.

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## BUSINESS LEADERSHIP DIRECTORS

### STATE BUSINESS DEVELOPMENT DIRECTOR

#### **Function:**

This position is responsible for building and leading all phases of CalSHRM's Corporate sponsorship programs. This involves responsibility for developing and maintaining a strategic plan for the sponsor programs that meet or exceed the overall business sponsorship revenue objectives. Responsibilities include sponsor prospecting, proposal customization and presentation, contract revision and servicing, and sponsor follow-up and support. Serves as a voting member of the CalSHRM State Council Board of Directors.

#### **Reports To:**

- The Executive Management Committee
- Legislative Conference Director

#### **Competencies:**

- Demonstrated competency in all 9 SHRM Behavioral Competencies
- SHRM BASK Competent
- High proficiency of business-to-business relationship development and administration.

#### **Responsibilities:**

- Developing a business development strategy focused on financial gain.
- Arranging business development meetings with prospective sponsors.
- Develop a growth strategy focused both on financial gain and sponsor satisfaction.
- Conduct research to identify new markets and sponsor needs.
- Promote CalSHRM's products/services addressing or predicting sponsor's objectives.
- Prepare sponsorship contracts and agreements ensuring adherence to California law-established rules and guidelines.
- Keep records of sponsorships funded, revenue, contracts, invoices, etc.
- Provide trustworthy feedback and after-sponsorship support.
- Build long-term relationships with new and existing sponsors.
- Develop committee members into valuable salespeople.
- Performs other duties as assigned by the State Director.

#### **Requirements:**

- Must be a SHRM National and local Chapter member in good standing. SHRM-CP/SCP certification recommended.

- Attendance and participation in all meetings of the State Council is required either in person or virtually.
- Proven working experience as a business development manager, sales executive, or a relevant role.
- Proven sales history.
- Experience in client relationship management and administration is a plus.
- Strong HR Market and CalSHRM organizational knowledge.
- Nominated by the Continuity Committee and elected to serve a two-year term beginning the first day of January and ending the last day of December under CalSHRM Bylaws. If appointed to fill a vacant term, they may run for election for up to two additional terms.

### **Goals:**

CalSHRM goals are established after successful election or appointment.

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## **SHRM STUDENT CHAPTERS DIRECTOR**

### **Function:**

Serves as a member of the state council with responsibility to assist and promote student SHRM chapter activities within the state. Works closely with SHRM's Student Program Manager in fulfilling these responsibilities.

Communicates state and SHRM goals and policies relative to student chapters and student membership to the chapters in the state.

### **Reports To:**

- The Executive Management Committee
- District Directors

### **Competencies:**

- Demonstrated competency in all 9 SHRM Behavioral Competencies
- SHRM BASK Competent
- High proficiency of business-to-business relationship development and administration.
- Strong familiarity with the workings of the student chapters and with the way Universities and Colleges support student chapters.
- A strong agent for change as a result of the shifting in leadership at student chapters and universities and in the business environment.
- Persistence in connecting and building the support network required to produce and execute the Student Games or Case Competition and a Student Conference or Workshop in California.

### **Responsibilities:**

- Serves as a liaison between student chapters within the state and the state council.
- Promotes the formation of new student chapters within the state by identifying potential sites and working with local professional chapters to develop these sites.

- Serves as a communications link between student chapters and SHRM's Student Program Manager in disseminating information relative to student programs, scholarships, certification, student conferences, etc.
- Encourages participation of student chapters in the Regional Student Conference on the state and/or regional level.
- May coordinate a state student conference or promote student activities at professional conferences within the state, region or at the SHRM Annual Conference and Exposition.
- Works with both faculty advisors and local professional chapter presidents to encourage student participation in local professional chapter meetings.
- Encourages professional chapters and state council to offer assistance to student members through scholarship programs, internships, special student activities, or sponsorship at local, state, or national conferences.
- Works with business development director to obtain sponsorships to support student chapter events.
- Encourages professional chapters and the state council to develop recognition programs for faculty advisors including, but not limited to, sponsorship at local, state, or SHRM conferences.
- Provides guidance and direction to faculty advisors and chapter student liaison representative relative to organization of new chapters, integration of Student Merit Award Program into student chapter activities, and opportunities for integration of student and professional chapter goals.
- Encourages student participation in SHRM publications (e.g., Echoes, SHRM Online) and in awards programs.
- Leverages DEI/membership attraction and retention programs to engage student chapter members in connecting to SHRM as a career partner and to provide diversity to chapters and the state council.

#### **Requirements:**

- Must be a SHRM member in good standing. SHRM Certification is highly desirable.
- Prior board service with a SHRM chapter (California preferred) or SHRM Council highly desirable.
- Nominated by the Continuity Committee and elected to serve a two-year term beginning the first day of January and ending the last day of December under CalSHRM Bylaws. If appointed to fill a vacant term, they may run for election for up to two additional terms.

#### **Goals:**

CalSHRM goals are established after successful election or appointment.

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## **STATE MARKETING DIRECTOR**

#### **Function:**

The Marketing Director will oversee, coordinate, and participate in the development of marketing strategies, outreach, and products for the state council. Serves as a voting member of the CalSHRM State Council Board of Directors.

#### **Reports to:**

- The Executive Management Committee

- District Directors

### **Competencies:**

- Demonstrated competency in all 9 SHRM Behavioral Competencies
- SHRM BASK Competent
- High proficiency and successful history in senior marketing roles and campaign creation
- Experience in digital and print marketing, Canva, CVENT, email content marketing, and social media marketing.

### **Responsibilities:**

- Provide Marketing update at each State Council Meeting
- Develop and implement a marketing strategy for CalSHRM that includes growth of the CalSHRM Brand as a trusted source in California.
- Set and achieve an annual marketing plan in conjunction with business development director.
- Work with SHRM to coordinate marketing/advertising efforts.
- Function as a liaison for all State Council CLA Directors to ensure coordination of marketing initiatives.
- Design and coordinate CalSHRM marketing collateral
- Coordinate and secure CalSHRM promotional items
- Develop and administer CalSHRM e-blast advertising through Constant Contact

### **Requirements:**

- SHRM membership in good standing preferred.
- Prior board service with a SHRM chapter or other non-profit 501c6 in marketing area highly desirable.
- Nominated by the Continuity Committee and elected to serve a two-year term beginning the first day of January and ending the last day of December under CalSHRM Bylaws. If appointed to fill a vacant term, they may run for election for up to two additional terms.

### **Goals:**

CalSHRM goals are established after successful election or appointment.

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## **STATE CONFERENCE AND EVENTS DIRECTOR**

### **Function:**

This position is critical to the success of CalSHRM. The role is responsible for the research, planning, organization, budgetary control, and on-site management of our State Legislative Conference, serving HR professionals in all markets. It requires innovative, entrepreneurial flair and eye for detail, business research acumen and project management skills. This position collaborates closely with and must maintain key relationships with the CalSHRM Marketing and Business Development directors. This role is responsible to develop and maintain key relationships with the volunteers, vendors, committee members, and service providers responsible for essential operational functions for CalSHRM events.

**Reports To:**

- The State Council Director & Executive Committee

**Competencies:**

- Demonstrated competency in all 9 SHRM Behavioral Competencies
- SHRM BASK Competent
- High proficiency and successful history in event planning, administration, and management.
- Strong proficiency in building and leading volunteer committees.

**Responsibilities:**

- Develops the conference strategy and event plan beginning 1 year in advance including conference venue logistics, contracts management, lodging, F&B, AV, entertainment, programming, and education programs.
- Forecasts, drafts, implements, and oversees the Conference operating budget.
- Created and recruits and leads qualified volunteers to execute critical operational and transactional conference functions with the objective of delivering the premier legislative event in California.
- Monitors, oversees, directs, and controls all operational activities related to the state conference.
- Chairs and leads the State Conference Committee.
- Acts as on-site manager for the CalSHRM Legislative Conference.
- Collaborates closely with marketing and business development directors to gain sponsorship for the events.

**Requirements:**

- Must be a SHRM member in good standing. SHRM Certification is highly desirable.
- Serves a two-year off-set term beginning the first day of May and ending the last day of April the following year.
- Provides critical content to marketing and media relations directors for promotion of events.
- Analyzes target market information to identify and recommend effective programming for conference.
- Identifies new market segments that will benefit from conference attendance.
- Maintains knowledge on California legislative hot topics and employment laws.
- Collaborates with SHRM and CalSHRM executives to develop strategic growth plans for future conferences and events.
- Nominated by the Continuity Committee and elected to serve a two-year term beginning the first day of January and ending the last day of December under CalSHRM Bylaws. If appointed to fill a vacant term, they may run for election for up to two additional terms.

**Goals:**

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## STATE MEDIA RELATIONS DIRECTOR

Promotes awareness of the purpose and actions of the council through ongoing communication efforts and branding initiatives, using the social media tools. Makes sure that HR professionals, both within and without of SHRM are fully informed of council resources and activities by using existing and developing social media. Collaborates closely with other council members to ensure that the council is portraying a consistent and professional image to its members and to the business community at large. Serves as a voting member of the CalSHRM State Council Board of Directors.

### Reports To:

- The State Council Director & Executive Committee

### Competencies:

- Demonstrated competency in all 9 SHRM Behavioral Competencies
- SHRM BASK Competent
- High proficiency and successful history in social media and other media, administration, and management.
- Strong proficiency in building influence and branding through LinkedIn, Twitter, Instagram, You Tube, Facebook, etc..

### Responsibilities:

- Evaluate the social media landscape and decide what platforms will be good tools for selected state council events.
- Work to understand and develop an effective strategy for use of new media, giving thoughtful consideration as to how this impacts the roles of the council's marketing director as well as the business development director.
- Develop a cyberspace persona and become immersed in the culture and use of new media as a representative of the council.
- Work to educate other state council members about the use of new media, both from a technical perspective and from a business approach. Plan to host a session on new media at the state conferences.
- Work to educate other local SHRM chapters about the use of new media, both from a technical perspective and from a business approach.
- Develop and implement a strategy to use new media in promoting and presenting the state conference and other events. This includes advocating for blog panels, free conference wireless internet and social media conference space.
- Develop relationship with SHRM to understand SHRM's position on social media, and to help promote this position at the state and local level.
- Consult with other state council representatives to compare best practices on use of new media, in various applications, and how they are used to promote state councils. State conferences and chapters.
- Work with the state conference director to ensure a strong social media presence at the state conference.
- Performs other related projects as agreed upon.

### Requirements:



- Must be a SHRM member in good standing. SHRM Certification is highly desirable.
- Some experience as a chapter leader desired.
- Nominated by the Continuity Committee and elected to serve a two-year term beginning the first day of January and ending the last day of December under CalSHRM Bylaws. If appointed to fill a vacant term, they may run for election for up to two additional terms.

**Goals:**

CalSHRM goals are established after successful election or appointment.

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