SMPS NEW YORK CHAPTER

Board Roles & Responsibilities

Aligned to the SMPS-NY Bylaws adopted September 16, 2026

October 2026 — v5

SMPS-NY GOVERNANCE NOTES

The following governance decisions apply chapter-wide and are referenced throughout this document.

Board Meetings: SMPS-NY holds monthly board meetings (12/year), exceeding the minimum of 8/year required by the Bylaws (§5.7). Participation by phone or video counts as presence in person (§5.7.1). The Executive Committee determines annually whether meetings are held in person, virtually, or in a hybrid format.

Voting Rights: The following 9 positions have voting rights at board meetings: President, Vice President/President-Elect, Immediate Past President, Secretary, Treasurer, and the 4 Directors-at-Large (Membership, Communications & Marketing, Events, Education & Professional Development). Committee Chairs attend board meetings and may offer input and feedback but do not vote.

Chair Attendance at Board Meetings: All chairs should attend board meetings. Chairs can offer input and feedback during discussions. This provides visibility into the next level of leadership and supports the succession pipeline.

Chair Appointment: All committee chairs are formally appointed by the President with Board approval (Bylaws §6.2), except the Finance Committee (chaired by Treasurer) and Nominations & Elections Committee (chaired by VP/President-Elect).

Terms: Directors-at-Large: 2-year terms (limited to two consecutive terms; Bylaws §5.2.5). Officers: President and VP/President-Elect 1 year each; Secretary and Treasurer 2 years each, limited to two consecutive terms, with the Secretary elected in even-numbered years and the Treasurer in odd-numbered years (Bylaws §5.2, §6.1). All terms begin January 1 (§5.2). Chairs: 1-year terms, renewable with no term limit.

Sponsorship: Sponsorship procurement (cold outreach, relationship building, closing) is the responsibility of the entire board, led by the Executive Committee. The Sponsorship Chair (reporting to the Treasurer) handles administrative enforcement: confirming payments, following up on invoices, ensuring sponsor benefits are delivered. The Sponsorship Chair does not lead procurement.

DEI: DEI is not siloed into a single role. The DEI & Community Impact Chair (under Membership) oversees scholarships and serves as a cross-cutting accountability partner, ensuring that every program, director, and chair is integrating DEI considerations into their work. This aligns with the Healthy Chapter Checklist, which weaves DEI into every component.

Director Roll-Up: If a chair position is unfilled, the director is responsible for absorbing those responsibilities and for actively recruiting to fill the vacancy.

Leadership Pipeline: The board structure is intentionally designed to create a path from committee member → chair → Director-at-Large → VP/President-Elect → President → Immediate Past President. Chair service provides visibility into board operations and prepares future directors.

UNIVERSAL OBLIGATIONS
ALL BOARD MEMBERS

Per the Governance Manual, Healthy Chapter Checklist, Affiliation Agreement, Chapter Leader's Code of Conduct, and Domains of Practice, every board member (officers and Directors-at-Large) must meet the following baseline expectations. These are not repeated in individual role descriptions.

- Attend all monthly board meetings (SMPS-NY holds 12/year; Bylaws minimum is 8, §5.7)
- Make decisions based on chapter goals and objectives, not personal interest
- Operate with a Duty of Care, Duty of Loyalty, and Duty of Obedience (Code of Conduct; Affiliation Agreement)
- Review, acknowledge, and sign the Chapter Leader's Code of Conduct annually
- Familiarize yourself with the SMPS Mission and Vision, DEI Philosophy & Policy, and the Affiliation Agreement
- Disclose any conflicts of interest and recuse from voting on conflicted matters (Bylaws §5.11)
- Support the chapter's strategic plan and annual goals
- Champion diversity, equity, and inclusion in all chapter activities, working with the DEI & Community Impact Chair as an accountability partner
- Use and promote chapter tools and resources provided by SMPS HQ
- Participate in SMPS governance training (CLS, webinars, regional meetings) as applicable
- Monitor industry trends and cultural shifts to ensure responsiveness to member needs (Healthy Chapter Checklist)
- Understand and apply the six SMPS Domains of Practice as a framework for programming and professional development: (1) Research, (2) Planning, (3) Client & Business Development, (4) Proposals, (5) Promotional Activity, (6) Management
- Uphold the integrity, mission, and strategic direction of SMPS through responsible governance and leadership (Affiliation Agreement)
- Participate in sponsorship procurement (cold outreach, relationship building) — this is a shared board responsibility led by the Executive Committee

SECTION 1: EXECUTIVE COMMITTEE

Per the Bylaws (§7.2), the Executive Committee consists of the President (chair), Vice President/President-Elect, Immediate Past President, Secretary, and Treasurer. The ExComm may exercise Board powers between meetings, reporting actions at the next Board meeting. The ExComm leads sponsorship procurement for the chapter; the Sponsorship Chair handles administrative enforcement under the Treasurer.

President

Position Title	President
Pillar	Executive Committee (Officer — ExComm Chair) — Voting
Purpose	The President is the principal officer of the chapter, exercising general oversight of its affairs and officers. The President sets the strategic direction for the program year, presides at all meetings of members, the Board, and the Executive Committee, and serves as the chapter's primary spokesperson. The President appoints all committee chairs (except Finance and Nominations & Elections) with Board approval. The President also determines, with the Executive Committee, whether monthly board meetings are held in person, virtually, or hybrid for the program year.
Term	1 year (automatic succession from President-Elect on January 1, effective 1/1/2027; Bylaws §5.2.2, §6.1)
Est. Time Commitment	10–15 hrs/month; heavier during budget season, elections, and annual events
Qualifications	• Must have served as President-Elect immediately prior (Bylaws §5.2.2) • Must be a Regular or Distinguished Life member of SMPS in good standing (Bylaws §6.1)

Responsible For	• Plan and chair all monthly board meetings and Executive Committee meetings; determine meeting format (in-person/virtual/hybrid) with ExComm annually • Serve as chapter spokesperson to SMPS HQ, industry partners, and the public • Oversee, motivate, and mentor all board members and directors • Implement the chapter's strategic plan and budget for the program year; conduct annual strategic planning session (Healthy Chapter Checklist) • Work with the Treasurer to develop and monitor the annual budget; review monthly bank statements • Appoint all committee chairpersons (with Board approval), except Finance and Nominations & Elections (Bylaws §6.2) • Sign contracts, deeds, or instruments authorized by the Board (with Secretary or authorized officer; Bylaws §6.2) • Ensure required HQ reporting on time: education report (January 31), finance report (January 31), board/volunteer roster (November 30) • Review and sign the SMPS Chapter Affiliation Agreement annually • Lead sponsorship procurement alongside the Executive Committee; ensure the full board participates in outreach • Ensure the chapter's incorporation status is current and all state filings are up to date (Finance Manual) • Ensure all board members and volunteers review and sign the Chapter Leader's Code of Conduct • Ensure programming covers all six SMPS Domains of Practice and offers CEU opportunities (Healthy Chapter Checklist; Affiliation Agreement) • Ensure chapter adheres to SMPS branding guidelines (Affiliation Agreement; Communications Manual) • Encourage board attendance at SMPS HQ Chapter Leader Meetups • Ensure a talent development / succession plan is in place (Healthy Chapter Checklist) • Ensure DEI is integrated across all chapter activities, working with the DEI & Community Impact Chair as a cross-cutting accountability partner

Accountable For	• Overall health, reputation, and strategic direction of the chapter • Board culture, engagement, and succession pipeline • Compliance with HQ requirements, Affiliation Agreement, Bylaws, and Code of Conduct • Timely submission of all HQ-required reports • Maintaining/improving the chapter's Healthy Chapter Checklist score
Notes / Pipeline	*Succession: Transitions to Immediate Past President on January 1.*

Vice President / President-Elect

Position Title	Vice President / President-Elect
Pillar	Executive Committee (Officer) — Voting
Purpose	The VP/President-Elect is the President's partner and the next President-in-waiting. Presides in the President's absence with full presidential powers. Chairs the Nominations & Elections Committee. Focuses on learning operations, planning the upcoming program year, and ensuring leadership continuity.
Term	1 year (automatically becomes President on January 1, effective 1/1/2027; Bylaws §5.2.2, §6.1)
Est. Time Commitment	8–12 hrs/month; increases during transition planning and election season
Qualifications	• Must have served on the Board for at least 1 year OR as a Committee Chair for at least 1 year (Bylaws §5.1.4) • Must be a Regular or Distinguished Life member in good standing, and have been one for at least 1 year at term start (Bylaws §5.1.3, §6.1)

Responsible For	• Preside at all meetings in the President's absence with full presidential powers (Bylaws §6.3) • Chair the Nominations & Elections Committee: appoint members (with Board approval), issue nominations call by August 1, ensure nominations received by September 15, verify candidate eligibility. The committee must have at least five members, each a chapter member for at least one year, and none may be Board candidates (Bylaws §5.2.6, §7.3) • Submit chapter board and volunteer roster to SMPS HQ by November 30 • Attend the SMPS Chapter Leadership Symposium (CLS) — chapter must budget for travel/lodging • Initiate planning for the upcoming program year (budget framework, strategic priorities, committee recruitment) • Support the President in overseeing chapter activities; shadow to build institutional knowledge • Lead sponsorship procurement alongside ExComm; ensure full board participates in outreach • Develop volunteer structure with clear roles, time commitments, and expectations (President-Elect Checklist) • Begin drafting presidential vision and 12-month action plan • Ensure a strong leadership pipeline by prioritizing succession planning
Accountable For	• Readiness to assume presidency with minimal disruption on January 1 • Smooth, transparent, inclusive elections process per bylaws • Early-stage planning positioning incoming board for success • Timely roster submission to HQ
Notes / Pipeline	*Succession: Automatically becomes President on January 1.* *Pipeline entry point to presidential track.* *CPSM exam offered free to Presidents-Elect by SMPS HQ.*

Immediate Past President

Position Title	Immediate Past President
Pillar	Executive Committee (Board member by virtue of office, Bylaws §5.2.1, §7.2) — Voting
Purpose	The IPP provides continuity, institutional memory, and mentorship. A board member with full voting rights and a member of the Executive Committee (§7.2). Serves in an advisory capacity ensuring lessons learned carry forward.
Term	1 year (automatic; year following presidency; Bylaws §5.2.2)
Est. Time Commitment	4–6 hrs/month
Qualifications	• Must have served as President immediately prior • Must remain a Regular or Distinguished Life member in good standing
Responsible For	• Assist President in mentoring board members • Stand ready to preside in absence of both President and VP/PE • Serve as advisor using historical chapter knowledge • Support succession planning — help identify and develop future leaders • Participate in sponsorship procurement alongside the board • Help capture and transfer institutional knowledge (chapter manual, MySMPS archival) • May be assigned additional duties at President's discretion
Accountable For	• Institutional knowledge transfer to new executive team • Honest, constructive counsel to President, VP/PE, and Exec Comm • Engaged but non-overbearing post-leadership involvement
Notes / Pipeline	*Role concludes after one year. Past Presidents encouraged to remain engaged through advisory roles, committee service, or mentorship.*

Secretary

Position Title	Secretary
Pillar	Executive Committee (Officer) — Voting
Purpose	Official record-keeper and governance custodian. Ensures all board actions are documented, stored, and accessible. Sits on Exec Comm. Co-signs official documents with the President.
Term	2 years (elected in even-numbered years; term limit: two consecutive 2-year terms; Bylaws §5.2.3, §6.1)
Est. Time Commitment	4–8 hrs/month; heavier around board meetings and elections
Qualifications	• Must have served on a chapter committee for at least 1 year (Bylaws §5.1.5) • Must be a Regular or Distinguished Life member in good standing, and have been one for at least 1 year at term start (Bylaws §5.1.3)
Responsible For	• Record and maintain minutes of all membership, Board, and Executive Committee meetings (Bylaws §6.4), Google email accounts and passwords, Chapter calendar (Executive Committee and Board), Zoom meeting manager account, contact sheets for board and past board leaders and volunteers • Distribute minutes to all board members in advance of next meeting • Maintain permanent records: bylaws, policies, minutes archive, Chapter Manual • Distribute meeting agendas in advance (with President) • Track board attendance and flag quorum issues (majority of board = quorum; Bylaws §5.9) • Manage official chapter correspondence as directed • Co-sign contracts and instruments with President when authorized (Bylaws §6.2) • Save documents in MySMPS Board community for archival/accessibility • Support consent agendas to streamline board reporting • Ensure all board members are familiar with bylaws and policies • Declare the Nominations & Elections Committee's slate elected by acclamation when no petition candidates are submitted (Bylaws §5.2.7) • Track shared program materials (i.e., step and repeat, tablecloths, other misc. signage)

Accountable For	• Completeness and accuracy of official record both on GoogleDrive and external hard drive • Timely distribution of minutes and governance documents • Decision-making history accessible to future leadership • MySMPS archival current

Treasurer

Position Title	Treasurer
Pillar	Executive Committee (Officer — Finance Committee Chair) — Voting
Purpose	Chief financial steward. Chairs the Finance Committee (President, PE, Treasurer). Responsible for budgeting, financial reporting, IRS compliance. Oversees the Sponsorship Chair, who handles administrative enforcement of sponsorship benefits (payment confirmation, follow-up, benefit delivery). Does not personally lead procurement of sponsorships — that is an ExComm-led, full-board effort.
Term	2 years (elected in odd-numbered years; term limit: two consecutive 2-year terms; Bylaws §5.2.4, §6.1)
Est. Time Commitment	6–10 hrs/month; heavier during budget development, audit, and IRS filing (Jan 15 deadline)
Qualifications	• Must have served on a chapter committee for at least 1 year (Bylaws §5.1.5) • Must be a Regular or Distinguished Life member in good standing, and have been one for at least 1 year at term start (Bylaws §5.1.3) • Working knowledge of accounting/bookkeeping strongly preferred (Finance Manual)

Responsible For	• Coordinate annual budget with President and Finance Committee; present to Board before fiscal year • Oversee financial integrity; ensure proper segregation of financial responsibilities (Finance Manual) • Produce financial reports for the Board at every monthly board meeting • Ensure annual financial audit or review is completed • Handle banking: deposits, payments, account reconciliation • Create financial codes for programs/events in StarChapter that include registration fees and/or sponsorship fees • Chair Finance Committee (President, PE, Treasurer; Bylaws §7.4) • Prepare/ensure timely filing of IRS Form 990/990-EZ/990-N by January 15; copy to HQ at Accounting@smps.org • Prepare/file SMPS HQ chapter finance report by September 30 (Jan 31 starting 2027) • Retain financial records per document retention policies • Ensure access to financial systems (re:Members, Billhighway, or HQ-designated platform) • Ensure reserves at least 50% of operating budget (Healthy Chapter Checklist) • Oversee Sponsorship Chair: ensure payments confirmed, invoices followed up, benefits enforced • Alert Board to financial implications of proposed decisions based on historical financial decisions (i.e., costs of events, insurance documents) • Ensure documented transition process for incoming Treasurer • Operate within 501(c)(6) parameters; comply with federal, state, local laws
Accountable For	• Chapter's fiscal health and financial transparency • Accurate, timely financial reporting to Board and HQ • IRS compliance and timely tax filings • Sponsorship revenue collected and obligations met (via Sponsorship Chair) • Reserves at or above 50% threshold
Notes / Pipeline	*Sponsorship Chair reports to Treasurer for admin/enforcement. Procurement is ExComm-led, full-board responsibility.*

Sponsorship Chair

Position Title	Sponsorship Chair
Pillar	Reports to Treasurer; appointed by President with Board approval (Bylaws §6.2) — Non-Voting
Purpose	Enforcer of sponsorship benefits for all corporate and event sponsors. Handles the administrative side: confirming payments, following up on invoices, ensuring benefits are delivered as contracted. Reports to the Treasurer. Does NOT lead procurement — that is the Executive Committee's responsibility, with full board participation including cold outreach. Appointed by the President with Board approval.
Term	1 year (no term limit; may be renewed)
Est. Time Commitment	4–6 hrs/month; heavier during renewal cycles (i.e., end of the year for preparation of securing Sponsors for new year) and major events
Qualifications	• Must be a member of SMPS in good standing • Prior committee or board experience preferred, not required • Strong organizational and follow-up skills
Responsible For	• Collaborate with Executive Committee on an annual refresh of sponsorship package • Work with Communications & Marketing Director for "Call to Action for Sponsors" campaigns (i.e., e-blasts and social media) • Reaffirm our annual In-Kind Sponsor Agreements with support from Secretary on historical knowledge and support Treasurer on reaffirming payments from annual Corporate Sponsors • Maintain sponsorship tracker (names, levels, payment status, benefit delivery) • Follow up on outstanding invoices; confirm payments with Treasurer (got their checks/confirmed payments) • Enforce delivery of sponsor benefits as contracted (logo placement, event recognition, newsletter, website, slides, verbal acknowledgment) • Ensure sponsors are publicly recognized at events and in all communications per agreements (Reference Education Manual & Healthy Chapter Checklist)

	• Coordinate with Events Director, Education Director, Communications & Marketing Director, and associated chairs to ensure benefits are received (i.e., free registrations, social media spotlights, free award submission, etc.) • Prepare sponsorship reports for monthly board meetings • Distribute sponsorship prospectus and renewal materials to prospective sponsors • Serve as day-to-day sponsor contact on administrative matters • Track vendor spend with Certified Minority Business Enterprises where applicable
Accountable For	• Every sponsor receives benefits promised at their level • Sponsorship records current; status reported to Treasurer and Board monthly • At-risk sponsors (e.g., late payments, undelivered benefits) flagged to Executive Committee promptly
Notes / Pipeline	*Pipeline: Strong preparation for Treasurer or Director-at-Large.*

SECTION 2: EVENTS PILLAR

"Bringing People Together — Chapter Events & Industry Conversations."

The Events Pillar is responsible for bringing people together through chapter events and industry conversations. Events Director is a Director-at-Large with voting rights. All chairs appointed by President with Board approval. Programming must cover all six Domains of Practice, align with Standards for Learning, and offer CEU opportunities.

Events Director (Director-at-Large)

Position Title	Events Director
Pillar	Events Pillar (Director-at-Large) — Voting

Purpose	Brings people together through chapter events and industry conversations. Owns the programming calendar. Oversees Programs Chair and Special Events Chair. Ensures events align with strategic goals, budget, the six Domains of Practice, SMPS Standards for Learning, and CEU requirements. Works across all pillars to ensure events support membership recruitment, sponsor recognition, and communications promotion.
Term	2 years; limited to two consecutive 2-year terms (Bylaws §5.2.5)
Est. Time Commitment	8–12 hrs/month; heavier before major events
Qualifications	• Must have served on a chapter committee or chair for at least 1 year (Bylaws §5.1.5) • Must have been a Regular or Distinguished Life member for at least 1 year at term start (Bylaws §5.1.3) • Prior event planning or project management in AEC preferred

Responsible For	• Develop annual events calendar and programming strategy with President and Education & PD Director • Ensure at least 4 events under Program Chair and 2 events under Special Events Chair, covering all six Domains of Practice (Healthy Chapter Checklist; Affiliation Agreement) • Ensure events qualify for CEUs where possible; provide CEU documentation (Education Manual; Standards for Learning) • Ensure programs align with Standards for Learning: defined learning objectives, multiple learning styles, impartial speaker selection • Draft annual events budget; manage expenditures within approved limits • Recommend Programs Chair and Special Events Chair to President for appointment (Bylaws §6.2); manage and hold accountable • Ensure event logistics (speakers, venues, catering, A/V) handled for each program • Coordinate with Communications & Marketing Director for timely promotion and website listing • Coordinate with Membership Director to leverage events for recruitment/retention • Coordinate with Sponsorship Chair for sponsor recognition at events • Coordinate with DEI & Community Impact Chair to ensure diverse voices in every program and DEI integration • Track attendance; collect post-event feedback via surveys; report to Board monthly • Collaborate with industry partners on joint programs (Healthy Chapter Checklist; Affiliation Agreement) • Share event registration data with President to prepare annual reports for HQ submission • If chair positions unfilled, absorb responsibilities and actively recruit
Accountable For	• Quality, attendance, and financial performance of events • Consistent calendar covering all six Domains • Performance and development of Programs and Special Events Chairs • Post-event feedback loops driving continuous improvement
Notes / Pipeline	*Pipeline: Strong path to VP/President-Elect.*

Programs Chair

Position Title	Programs Chair
Pillar	Events Pillar (Reports to Events Director; appointed by President per §6.2) — Non-Voting (attends board meetings)
Purpose	Responsible for recurring AEC industry and networking programs (monthly luncheons, panels, firm/project tours, happy hours). Curates content, coordinates speakers, and ensures each program delivers value aligned with the Domains of Practice and Standards for Learning. Appointed by President with Board approval.
Term	1 year (no term limit; may be renewed)
Est. Time Commitment	5–8 hrs/month; heavier 2–3 weeks before each event
Qualifications	• Must be a member of SMPS in good standing • Prior committee participation preferred, not required • Strong interest in AEC industry trends
Responsible For	• Identify and secure speakers, panelists, and content ensuring Domains of Practice coverage • Assess member needs before developing programs (surveys/feedback; Healthy Chapter Checklist) • Ensure programs incorporate Standards for Learning: defined objectives, multiple styles, impartial selection • Develop event agendas and run-of-show documents • Coordinate venue, catering, A/V logistics • Serve as MC and/or delegate on-site host: welcome attendees, introduce speakers, manage timing • Ensure CEU documentation for eligible programs (Education Manual) • Recognize speakers and sponsors (gift/donation, follow-up note within 2 weeks) • Provide event descriptions, speaker bios, promo content to Communications team at least 30 days before any event • Coordinate with Sponsorship Chair on event sponsor recognition • Coordinate with DEI & Community Impact Chair to ensure diverse programming • Collect post-event feedback; share summaries with Events Director • Leverage SMPS HQ complimentary content (e-books, learning labs) as supplemental programming

Accountable For	• Well-organized, well-attended programs aligned with Domains of Practice • Speaker/venue commitments confirmed in advance • Timely content to communications team • Post-event feedback data maintained
Notes / Pipeline	*Pipeline: Strong path to Events Director.*

Special Events Chair

Position Title	Special Events Chair
Pillar	Events Pillar (Reports to Events Director; appointed by President per §6.2) — Non-Voting (attends board meetings)
Purpose	Leads planning and execution of the chapter's signature annual events (Liberty Awards Reception, MCAs, new year celebration/annual chapter kick-off). Highest-visibility activities and often largest revenue generators. Appointed by President with Board approval.
Term	1 year (no term limit; may be renewed)
Est. Time Commitment	5–10 hrs/month avg; 15–20+ hrs in 4–6 weeks before signature events
Qualifications	• Must be a member of SMPS in good standing • Prior committee participation preferred • Large-scale event logistics experience strongly preferred

Responsible For	• Lead end-to-end planning for signature events (Liberty Awards, MCAs, new year/annual chapter kick-off) • Develop event budgets, timelines, project plans • Secure venues; negotiate vendor contracts; manage catering/A/V/décor • Recruit and manage event-specific volunteer committees; recognize volunteers (Education Manual Step 11) • Coordinate with Communications team on branding, invitations, promotion; ensure chapter signage • Coordinate with Sponsorship Chair on event-specific packages and on-site recognition • Coordinate with DEI & Community Impact Chair to ensure events welcome diverse individuals and also MBE vendor spend • Manage event-day logistics: registration, setup, breakdown, timeline • Reconcile post-event financials with Treasurer • Collect feedback; document lessons learned for future chairs
Accountable For	• Financially successful, well-attended events reflecting chapter brand • Event budgets within approved limits • Institutional knowledge preserved via documented event playbooks
Notes / Pipeline	*Pipeline: Strong path to Events Director or other Director At-Large.*

SECTION 3: MEMBERSHIP PILLAR

Membership Director (Director-at-Large)

Position Title	Membership Director (Director-at-Large)
Pillar	*Membership Pillar (Director-at-Large) — Voting*
Purpose	Serves as the strategist and governing voice for the New York Chapter's members and as the primary liaison to SMPS HQ regarding database metrics, governs Affiliate Chairs, and oversees specialized impact initiatives. While the Affiliate Chairs handle localized execution or specific programs, the Membership Director owns the macro-level

	recruitment/retention strategy, structural onboarding, and direct governance of the committee's budget and affiliates.
Term	*2 years; limited to two consecutive 2-year terms (Bylaws §5.2.5)*
Est. Time Commitment	1-2 hrs/week
Qualifications	• Must have served on a chapter committee or chair for at least 1 year (Bylaws §5.1.5) • Must have been a Regular or Distinguished Life member for at least 1 year at term start (Bylaws §5.1.3)
Responsible For	• Develop, implement, and track an annual Membership Strategic Plan focused on measurable recruitment and retention goals. • Access the SMPS HQ routine reports to monitor live data regarding renewals, drops, and new member trends. • Oversee the structural execution of new member orientations and chapter member satisfaction/feedback surveys; as this data will guide other Directors-At Large on programs and events. Reach out to new members as an introduction. Provide membership information to prospective members. • Supervise, support, and facilitate monthly alignment meetings for the regional affiliate chairs (i.e., LI, NJ, WHV, and NYC) and the DEI & Community Impact Chair to maintain cohesive chapter messaging and tracking. • Discuss nominees for the Member Spotlight with regional affiliate chairs and the DEI & Community Impact Chair to inform the Newsletter/Blog Chair. Collaborate with the Newsletter/Blog Chair on interviewing coordination efforts for the Membership Spotlight content. • Attend monthly Board of Directors meetings and present a data-driven membership health report. • Coordinating with the Website Chair to ensure membership benefits are accurately represented on the New York Chapter website. • Work with Education & Professional Development Chair to ensure events qualify for CEUs where possible; provide CEU documentation (Education Manual; Standards for Learning)
Accountable For	• Meeting the New York Chapter's annual retention and recruitment benchmarks

	• The accurate representation and presentation of the New York Chapter's membership data to the Executive Committee.
Notes / Pipeline	*Pipeline: Strong path to VP/President-Elect.*

Long Island Chair

Position Title	Long Island Chair
Pillar	*Membership Pillar (Reports to Membership Director; appointed by President per §6.2) — Non-Voting (attends board meetings)*
Purpose	Serves as the localized "face" and regional community-builder for SMPS within a specific geographic area. Unlike the Membership Director, this role focuses on local grassroots relationship management, regional networking cadence, and micro-level member touchpoints.
Term	*1 year (no term limit; may be renewed)*
Est. Time Commitment	1-2 hrs/week; heavier 2–3 weeks before each event
Qualifications	• Must be a member of SMPS in good standing • Prior committee participation preferred, not required
Responsible For	• Plan and execute quarterly localized in-person networking events (e.g., "Coffee & Connections," "Knowledge Exchange," or roundtables) tailored to their regional audience. This includes securing venues and sponsors for these events. • Personally contact new and transferring members within their defined geographic zone on a monthly basis to welcome them and introduce them to regional resources. • Facilitate monthly meetings with regional committee members to discuss event/program ideas to engage and network with other members. • Coordinate with Membership Director to monitor regional drop and expiration lists (provided by the Membership Director) and conduct direct outreach to members whose credentials are set to lapse (within three months of a new member joining and within three months of a member leaving SMPS).

	• Partner with the Events Director and Education & Professional Development Director to find opportunities for satellite programming or regional hosting to maximize regional attendance and membership value. • Submit monthly status reports regarding local attendance data, regional market trends, and member feedback to the Membership Director ahead of board meetings.
Accountable For	• The attendance levels, demographic tailoring, and baseline financial viability of localized regional networking events are in alignment/coordinate with the Events Director. • Ensuring every new or expiring member within their designated territory receives a direct touchpoint (within three months of a new member joining and within three months of a member leaving SMPS). • Recruiting and managing committees to support localized efforts.
Notes / Pipeline	*Pipeline: Strong path to Membership Director*

New Jersey Chair

Position Title	New Jersey Chair
Pillar	*Membership Pillar (Reports to Membership Director; appointed by President per §6.2) — Non-Voting (attends board meetings)*
Purpose	Serves as the localized "face" and regional community-builder for SMPS within a specific geographic area. Unlike the Membership Director, this role focuses on local grassroots relationship management, regional networking cadence, and micro-level member touchpoints.
Term	*1 year (no term limit; may be renewed)*
Est. Time Commitment	1-2 hrs/week; heavier 2–3 weeks before each event
Qualifications	• Must be a member of SMPS in good standing • Prior committee participation preferred, not required
Responsible For	• Plan and execute quarterly localized in-person networking events (e.g., "Coffee & Connections," “Knowledge Exchange,” or

	roundtables) tailored to their regional audience. This includes securing venues and sponsors for these events. • Personally contact new and transferring members within their defined geographic zone on a monthly basis to welcome them and introduce them to regional resources. • Facilitate monthly meetings with regional committee members to discuss event/program ideas to engage and network with other members. • Coordinate with Membership Director to monitor regional drop and expiration lists (provided by the Membership Director) and conduct direct outreach to members whose credentials are set to lapse (within three months of a new member joining and within three months of a member leaving SMPS). • Partner with the Events Director and Education & Professional Development Director to find opportunities for satellite programming or regional hosting to maximize regional attendance and membership value. • Submit monthly status reports regarding local attendance data, regional market trends, and member feedback to the Membership Director ahead of board meetings.
Accountable For	• The attendance levels, demographic tailoring, and baseline financial viability of localized regional networking events are in alignment/coordinate with the Events Director. • Ensuring every new or expiring member within their designated territory receives a direct touchpoint (within three months of a new member joining and within three months of a member leaving SMPS). • Recruiting and managing committees to support localized efforts.
Notes / Pipeline	*Pipeline: Strong path to Membership Director*

Westchester / Hudson Valley Chair

Position Title	Westchester / Hudson Valley Chair
Pillar	*Membership Pillar (Reports to Membership Director; appointed by President per §6.2) — Non-Voting (attends board meetings)*

Purpose	Serves as the localized "face" and regional community-builder for SMPS within a specific geographic area. Unlike the Membership Director, this role focuses on local grassroots relationship management, regional networking cadence, and micro-level member touchpoints.
Term	*1 year (no term limit; may be renewed)*
Est. Time Commitment	1-2 hrs/week; heavier 2–3 weeks before each event
Qualifications	• Must be a member of SMPS in good standing • Prior committee participation preferred, not required
Responsible For	• Plan and execute quarterly localized in-person networking events (e.g., "Coffee & Connections," “Knowledge Exchange,” or roundtables) tailored to their regional audience. This includes securing venues and sponsors for these events. • Personally contact new and transferring members within their defined geographic zone on a monthly basis to welcome them and introduce them to regional resources. • Facilitate monthly meetings with regional committee members to discuss event/program ideas to engage and network with other members. • Coordinate with Membership Director to monitor regional drop and expiration lists (provided by the Membership Director) and conduct direct outreach to members whose credentials are set to lapse (within three months of a new member joining and within three months of a member leaving SMPS). • Partner with the Events Director and Education & Professional Development Director to find opportunities for satellite programming or regional hosting to maximize regional attendance and membership value. • Submit monthly status reports regarding local attendance data, regional market trends, and member feedback to the Membership Director ahead of board meetings.
Accountable For	• The attendance levels, demographic tailoring, and baseline financial viability of localized regional networking events are in alignment/coordinate with the Events Director.

	• Ensuring every new or expiring member within their designated territory receives a direct touchpoint (within three months of a new member joining and within three months of a member leaving SMPS). • Recruiting and managing committees to support localized efforts.
Notes / Pipeline	*Pipeline: Strong path to Membership Director*

New York City Chair

Position Title	New York City Chair
Pillar	*Membership Pillar (Reports to Membership Director; appointed by President per §6.2) — Non-Voting (attends board meetings)*
Purpose	Serves as the localized "face" and regional community-builder for SMPS within a specific geographic area. Unlike the Membership Director, this role focuses on local grassroots relationship management, regional networking cadence, and micro-level member touchpoints.
Term	*1 year (no term limit; may be renewed)*
Est. Time Commitment	1-2 hrs/week; heavier 2–3 weeks before each event
Qualifications	• Must be a member of SMPS in good standing • Prior committee participation preferred, not required
Responsible For	• Plan and execute quarterly localized in-person networking events (e.g., "Coffee & Connections," “Knowledge Exchange,” or roundtables) tailored to their regional audience. This includes securing venues and sponsors for these events. • Personally contact new and transferring members within their defined geographic zone on a monthly basis to welcome them and introduce them to regional resources. • Facilitate monthly meetings with regional committee members to discuss event/program ideas to engage and network with other members. • Coordinate with Membership Director to monitor regional drop and expiration lists (provided by the Membership Director) and conduct direct outreach to members whose credentials are set to lapse (within

	three months of a new member joining and within three months of a member leaving SMPS). • Partner with the Events Director and Education & Professional Development Director to find opportunities for satellite programming or regional hosting to maximize regional attendance and membership value. • Submit monthly status reports regarding local attendance data, regional market trends, and member feedback to the Membership Director ahead of board meetings.
Accountable For	• The attendance levels, demographic tailoring, and baseline financial viability of localized regional networking events are in alignment/coordinate with the Events Director. • Ensuring every new or expiring member within their designated territory receives a direct touchpoint (within three months of a new member joining and within three months of a member leaving SMPS). • Recruiting and managing committees to support localized efforts.
Notes / Pipeline	*Pipeline: Strong path to Membership Director*

DEI & Community Impact Chair

Position Title	DEI & Community Impact Chair
Pillar	*Membership Pillar (Reports to Membership Director; appointed by President per §6.2) — Non-Voting (attends board meetings)*
Purpose	*Oversees scholarships (separate from awards) and serves as a cross-cutting DEI accountability partner — ensuring that every program, director, and chair is integrating DEI considerations into their work. Works across all pillars, not just membership. Aligns with Healthy Chapter Checklist (DEI woven into every component) and Chapter Leader's Code of Conduct.* Serves to ensure diversity, equity, and inclusion are actively championed across the New York Chapter, the firms we represent, the communities we serve, and the local A/E/C industries. This role is unique because it does not manage a geographic region, but instead evaluates and infuses equity frameworks into all chapter actions. This role oversees and administers the Chapter's scholarships and community outreach programs.

Term	*1 year (no term limit; may be renewed)*
Est. Time Commitment	1-2 hrs/week; heavier 2–3 weeks before each event
Qualifications	• Must be a member of SMPS in good standing • Prior committee participation preferred, not required
Responsible For	• Oversee the requirements, distribution timeline, collection, and evaluation of the Chapter-backed scholarship applications. • Facilitate an unbiased, blind evaluation with the Board to review scholarship applications, ensuring adherence to objective scoring criteria, equity, and inclusion guidelines. • Review New York Chapter materials, speaker lineups, venue selections, and vendor procurement alongside the Events Director and Education & Professional Development Director teams to advocate for welcoming environments and inclusive representation. • Cultivate, track, and build relationships and operational pipelines with local minority-owned business associations, student groups, and universities to organize programs that increase awareness and participation of underrepresented groups in the A/E/C industry. • Track and report metrics related to scholarship distribution, diverse speaker representation, and community impact initiatives to the Membership Director on a regular basis.
Accountable For	• The integrity, transparency, and unbiased execution of the New York Chapter's scholarship selection processes. • Alignment of chapter activities with the SMPS National diversity, equity, and inclusion Philosophy & Policy.
Notes / Pipeline	*Pipeline: Strong path to Membership Director*

SECTION 4: COMMUNICATIONS & MARKETING PILLAR

Communications & Marketing Director (Director-at-Large)

Position Title	Communications & Marketing Director (Director-at-Large)
Pillar	*Communications & Marketing Pillar (Director-at-Large) — Voting*
Purpose	Serves as the chief brand coordinator, editorial reviewers, and integrated marketing strategist for the chapter. The Communications & Marketing Director synchronizes all mediums into a single narrative voice, protecting the SMPS brand identity and approving high-stakes messaging while the reporting Chairs focus deeply on execution within a single technical medium (i.e., public relations, social media, newsletter/blog, website, etc.). This role sets the overarching public brand identity, messaging, and integrated marketing strategy for the New York Chapter as it aligns with SMPS Headquarters. This position oversees the Public Relations, Social Media, Newsletter/Blog, and Website chairs to ensure consistent, professional, and timely messaging across all internal and external communication channels.
Term	*2 years; limited to two consecutive 2-year terms (Bylaws §5.2.5)*
Est. Time Commitment	6 hrs/week; between posts and coordination with volunteers; heavier during major events
Qualifications	• Must have served on a chapter committee or as a chair for at least 1 year (Bylaws §5.1.5) • Must have been a Regular or Distinguished Life member for at least 1 year at term start (Bylaws §5.1.3) • May not hold more than one Board position at a time (Bylaws §5.1.3)
Responsible For	• Create and mandate an annual Integrated Marketing & Editorial Calendar, that enforces alignment with the SMPS Identity Guidelines across all digital and print collateral, and maintains chapter activity schedule. • Manage the communications line-item budget, including software subscriptions for graphic design, website hosting, email marketing, and social media scheduling platforms.

	• Conduct regular committee alignment meetings to eliminate silos between the Public Relations, Social Media, Newsletter/Blog, and Website functions, keeping all chairs updated on chapter policies and goals. • Review and sign off on high-impact public statements, major press releases, and automated system assets (i.e., social media and newsletter/blog) before deployment. • Compile and present quarterly communication health metrics (e.g., email open rates, social engagement growth, website traffic patterns, and SEO performance) to the Board of Directors. • Coordination with other Directors for materials and information, etc. • Ensures all chairs are coordinating with the Sponsorship Chair to make sure all corporate sponsor benefits are being met.
Accountable For	• Chapter-wide compliance with SMPS Chapter Management Manual - Communications across all public channels. • The timely, accurate, and professional distribution of all promotional marketing regarding chapter events. • The health and security of all communication subscriptions (i.e., Canva) and digital communication infrastructure (i.e., LinkedIn, Instagram, Facebook, YouTube, StarChapter newsletter platform).
Notes / Pipeline	

Public Relations Chair

Position Title	Public Relations Chair
Pillar	*Communications & Marketing Pillar (Reports to Comms & Marketing Director; appointed by President per §6.2) — Non-Voting (attends board meetings)*
Purpose	*Primarily responsible for, but not limited to, external industry-facing publications and awareness of SMPS-NY — promoting the chapter's value and visibility to the broader AEC industry and potential members.* Public Relations Chair focuses on the external-facing industry publications to build awareness of SMPS and drive external A/E/C

	industry credibility. This role establishes the New York Chapter's public relations plan, secures external press features, and coordinates outreach to media outlets and allied industry organizations. This role also focuses entirely on earned media, press cultivation, and strategic cross-promotions with allied industry associations rather than managed internal lists.
Term	*1 year (no term limit; may be renewed)*
Est. Time Commitment	
Qualifications	• Must be a member of SMPS in good standing • Prior committee participation preferred, not required
Responsible For	• Build, maintain, and systematically update a comprehensive media contact list comprising regional A/E/C trade journalists, editors, and business journals. • Draft, format, and distribute compelling pre- and post-event press releases regarding major chapter milestones, board installations, scholarship awards, and special events programs. • Maintain ongoing communications and coordinate cross-promotional efforts with peer industry organizations (e.g., AIA, ACEC, WTS, etc.) to expand chapter visibility outside the direct member directory. • Pitch chapter leadership, subject matter experts, or guest articles to external business publications to promote the professionalism of the chapter. • Track, clip, and archive all external media mentions and print or digital features regarding the New York Chapter.
Accountable For	• Maintaining the external reputation, professional credibility, and press visibility of the chapter in regional trade media. • The accuracy and messaging alignment of all distribution materials sent to journalists and external boards.
Notes / Pipeline	*Pipeline: Strong path to Communications & Marketing Director*

Social Media Chair

Position Title	Social Media Chair
Pillar	*Communications & Marketing Pillar (Reports to Comms & Marketing Director; appointed by President per §6.2) — Non-Voting (attends board meetings)*
Purpose	*Primarily responsible for, but not limited to, managing the chapter's LinkedIn, Instagram, and YouTube strategy — ensuring consistent, engaging content that promotes events, highlights members, shares industry news, and grows the chapter's digital footprint.* Serves as the real-time community conversationalist and active digital storyteller across social media platforms: LinkedIn, Instagram, and YouTube. This role is unique because of its high-frequency, immediate nature, focusing on rapid visual content creation, follower engagement, and real-time event coverage.
Term	*1 year (no term limit; may be renewed)*
Est. Time Commitment	
Qualifications	• Must be a member of SMPS in good standing • Prior committee participation preferred, not required

Responsible For	• Maintain, monitor, and scale the New York Chapter's presence on professional and visual networks, implementing custom engagement strategies tailored to each platform:
	  • LinkedIn: Focus on professional networking, programs, and corporate sponsor spotlights.
	  • Instagram: Drive visually rich storytelling utilizing stories, reels, and carousel photo summaries of events (pre- and post-).
	  • YouTube: Manage and organize the New York Chapter's video library, publishing recorded webinars and town halls, and leadership interviews.
	• Design graphics and schedule weekly posts tying into the Communications Calendar, per oversight of Communications & Marketing Director, to maintain a steady, predictable grid cadency, and visual brand consistency.
	• Coordinate with on-site event volunteers to capture high-resolution imagery and live-posting snippets during New York Chapter (and Affiliate Chairs) programs.

	• Coordinate with the Events Director to obtain photography and videography from In-Kind Sponsor (FRAMES) after events. Then distribute copies to the Website Chair for content to be uploaded to StarChapter/Chapter website for external audience access. • Monitor, reply to, and escalate comments, direct messages, and brand mentions to ensure professional, accurate, and welcoming interactions.
Accountable For	• Growth, daily engagement rates, and professional moderation across all native social platform profiles. • Ensuring all visual and written social posts adhere to the SMPS Member Social Media Policy and brand standards.
Notes / Pipeline	*Pipeline: Strong path to Communications & Marketing Director*

Newsletter / Blog Chair

Position Title	Newsletter / Blog Chair
Pillar	*Communications & Marketing Pillar (Reports to Comms & Marketing Director; appointed by President per §6.2) — Non-Voting (attends board meetings)*
Purpose	*Primarily responsible for, but not limited to, managing the monthly newsletter and distribution of event recaps — keeping members informed, engaged, and connected to the chapter's programming and accomplishments.* Serves as the editor and publisher of the New York Chapter's internal digital communications, managing the construction, timeline, and dissemination of the monthly e-newsletter, blog recaps, and targeted e-blasts. This role synthesizes deep-dive content (e.g, educational recaps, member spotlights, and news digests) into a scheduled, recurring monthly publication curated specifically for the existing membership base.
Term	*1 year (no term limit; may be renewed)*
Est. Time Commitment	
Qualifications	• Must be a member of SMPS in good standing • Prior committee participation preferred, not required

Responsible For	• Gather, draft, and format content for the New York Chapter's monthly digital newsletter ensuring the upcoming educational programs, board notes, job board postings, and other notices are cleanly laid out. • Coordinate with the Sponsorship Chair on corporate sponsors' article benefit is being used • Source or author detailed, value-add recaps of educational programs, panels, and networking events for publication on the chapter blog. • Working in close collaboration with the Membership Director to interview and draft recurring features highlighting new members, recent CPSM recipients, and other member milestones, tailoring messaging to resonate with various member segments and personas. • Perform thorough proofreading and formatting checks on all internal submissions to ensure compliance with the SMPS Chapter Management Manual - Communications. • Work closely with the Membership Director to ensure email distribution lists are regularly updated with current active member data. Report back to the Membership Director for bounce back emails for Membership Director to follow up with individuals for new contact information.
Accountable For	• The layout quality, professional copyediting, and timely broadcast of the monthly digital newsletter. • The continuity and value-add educational depth of the New York Chapter's blog content.
Notes / Pipeline	*Pipeline: Strong path to Communications & Marketing Director*

Website Chair

Position Title	Website Chair
Pillar	*Communications & Marketing Pillar (Reports to Comms & Marketing Director; appointed by President per §6.2) — Non-Voting (attends board meetings)*

Purpose	*Primarily responsible for, but not limited to, overseeing website maintenance, UI/UX, and SEO strategy — ensuring the chapter's website is current, functional, and serves as a primary gateway for members, prospective members, and sponsors.* Serves as the primary content administrator of the New York Chapter's website. This position ensures structural integrity, a clean user experience, ongoing search engine optimization (SEO) performance, and accurate integration with chapter registration databases. This role controls the functional backbone where all event conversions, job board purchases, and informational searches take place.
Term	*1 year (no term limit; may be renewed)*
Est. Time Commitment	
Qualifications	• Must be a member of SMPS in good standing • Prior committee participation preferred, not required
Responsible For	• Promptly upload and update event registration pages, speaker biographies, and coordinate cross-platform content with Public Relations Chair and Newsletter/Blog Chair. Coordinate with Sponsorship Chair for current/accurate corporate sponsor logos are displayed on appropriate webpages. • Monitor and optimize backend metadata, ADA compliance (i.e., image alt-text), heading structures, and targeted keywords to improve organic search rankings for the New York Chapter. • Coordinate with Treasurer to track, add, and audit postings within the New York Chapter's digital Job Bank, ensuring listing lifespans match with parameters. • Conduct systematic monthly audits across the site architecture to rapidly identify and repair broken hyperlinks, visual layout bugs, and formatting inconsistencies. • Interface directly with StarChapter tech support to manage customer support tickets from other authorized users.
Accountable For	• The user experience layout integrity, uptime, content, and overall technical functionality of the website. • The visibility of the chapter site via structured SEO best practices.
Notes / Pipeline	*Pipeline: Strong path to Communications & Marketing Director*

SECTION 5: EDUCATION & PROFESSIONAL DEVELOPMENT PILLAR

Education & Professional Development Director (Director-at-Large)

Position Title	Education & Professional Development Director (Director-at-Large)
Pillar	*Education & Professional Development Pillar (Director-at-Large) — Voting*
Purpose	*Helps members at all stages in their careers grow through learning. Oversees the chapter's educational strategy, certification support, and mentorship programming. Works closely with the Events Director to align educational content with the programming calendar and ensure all six Domains of Practice are covered.*
Term	*2 years; limited to two consecutive 2-year terms (Bylaws §5.2.5)*
Est. Time Commitment	2-3 hours a week
Qualifications	• Must have served on a chapter committee or as a chair for at least 1 year (Bylaws §5.1.5) • Must have been a Regular or Distinguished Life member for at least 1 year at term start (Bylaws §5.1.3) • May not hold more than one Board position at a time (Bylaws §5.1.3)
Responsible For	Education Strategy & Program Development: Create and maintain an annual Education & Professional Development Calendar that aligns with SMPS Headquarters initiatives, chapter strategic goals, member interests, and evolving A/E/C industry trends. Learning Experience Oversight: Oversee the planning, coordination, and delivery of all educational programming, including workshops, webinars, panels, leadership sessions, certification support, and professional development events. Budget & Resource Management: Manage the education and professional development line-item budget, including speaker fees,

	venue costs, training platforms, educational materials, certification resources, and program technology tools. Committee Leadership & Collaboration: Lead and coordinate the Education & Professional Development Committee to ensure alignment across programming initiatives, mentorship efforts, leadership development activities, and strategic chapter priorities. Speaker & Partnership Management: Recruit, onboard, and maintain relationships with industry speakers, trainers, sponsors, educational partners, and subject matter experts to deliver high-quality member experiences. Professional Standards & Quality Assurance: Review and approve educational content, program objectives, presentation materials, and learning outcomes to ensure consistency, professionalism, relevance, and member value. Member Growth & Certification Support: Promote leadership development opportunities and support CPSM certification awareness, preparation initiatives, and continuing education engagement among members. Engagement & Performance Reporting: Track and present program performance metrics such as attendance, member participation, satisfaction survey results, certification engagement, and educational impact to the Board of Directors. Cross-Functional Chapter Alignment: Collaborate with Communications & Marketing, [Sponsorship], Membership, and chapter leadership to ensure educational initiatives are effectively promoted, supported, and integrated into the overall member experience. Succession & Leadership Development: Foster a culture of continuous learning and volunteer engagement by identifying future chapter leaders, supporting mentorship opportunities, and encouraging professional advancement within the SMPS-NY community.
Accountable For	Developing and executing the chapter's education and professional development strategy. Delivering relevant, high-quality educational programs, workshops, and training opportunities. Supporting member career advancement, leadership growth, and CPSM certification initiatives.

	Identifying industry trends and aligning programming with member and A/E/C industry needs. Coordinating speakers, presenters, facilitators, and educational partnerships. Managing the education calendar, program logistics, and related budgets. Collaborating with board members, committees, and SMPS Headquarters to align initiatives with chapter goals. Measuring program effectiveness, member engagement, and participation outcomes. Maintaining a consistent standard of professionalism, value, and member experience across all educational offerings.
Notes / Pipeline	*Pipeline: Strong path to Vice President/President-Elect*

CPSM Chair

Position Title	CPSM Chair
Pillar	*Education & PD Pillar (Reports to Education & PD Director; appointed by President per §6.2) — Non-Voting (attends board meetings)*
Purpose	The CPSM Chair's unique purpose is to drive certification success and elevate professional standards within SMPS-NY by guiding members through the CPSM journey. The role exists to make the certification process accessible, supported, and structured—turning individual ambition for professional advancement into measurable chapter-wide growth in expertise, credibility, and industry recognition.
Term	*1 year (no term limit; may be renewed)*
Est. Time Commitment	
Qualifications	Active SMPS member
Responsible For	CPSM Program Strategy & Support Plan Development: Design and implement an annual CPSM support plan aligned with SMPS National

	certification requirements and the SMPS-NY Education & Professional Development strategy. CPSM Learning Program Delivery: Organize and facilitate CPSM study groups, review sessions, and exam preparation workshops for chapter members in collaboration with SMPS-Upstate. Candidate Support & Guidance: Serve as the primary point of contact for CPSM candidates, providing guidance on eligibility, application steps, exam process, and study resources. Certification Awareness & Chapter Engagement: Promote CPSM certification awareness and engagement across the chapter through programming, communications, and outreach efforts. Cross-Functional & National Alignment: Collaborate with the Education & Professional Development Director and SMPS-National resources to ensure consistency and alignment with broader certification standards. Program Evaluation & Continuous Improvement: Continuously refine CPSM programming based on candidate feedback, pass rates, and evolving certification requirements.
Accountable For	Collaborating with the Education & Professional Development Director to align CPSM initiatives with broader learning objectives and programming. Supporting a consistent, structured pathway that increases the chapter's overall CPSM certification attainment and professional development impact. CPSM CEU documentation and providing to members in a timely manner Evaluating and improving CPSM programming based on member feedback, success rates, and engagement metrics.
Notes / Pipeline	*Pipeline: Strong path to Education & Professional Development Director*

Mentorship Chair

Position Title	Mentorship Chair

Pillar	*Education & PD Pillar (Reports to Education & PD Director; appointed by President per §6.2) — Non-Voting (attends board meetings)*
Purpose	The unique purpose of the Mentorship Chair is to intentionally build meaningful professional relationships that accelerate member growth, strengthen chapter engagement, and develop the next generation of leaders in SMPS-NY by pairing experienced professionals with emerging talent in a structured and impactful way.
Term	*1 year (no term limit; may be renewed)*
Est. Time Commitment	
Qualifications	Active SMPS member
Responsible For	Mentorship Program Strategy & Framework Development: Design and manage an annual mentorship program framework, including structure, timelines, participation guidelines, and overall program design. Mentor & Mentee Matching and Onboarding: Develop and oversee the mentor and mentee application, onboarding, and matching process to ensure strong, goal-aligned, and development-focused pairings. Program Standards & Engagement Structure: Establish clear expectations, tools, and resources that support effective, consistent, and high-quality mentor-mentee engagement throughout the program cycle. Program Facilitation & Experience Management: Facilitate program kickoff sessions, check-ins, and closing events to support engagement, relationship development, and program continuity. Relationship Oversight & Support: Monitor mentorship relationships throughout the program cycle, providing guidance, support, and intervention when needed to ensure successful outcomes. Resource Development & Program Toolkits: Create and distribute mentorship resources such as discussion guides, goal-setting templates, and best practice materials to support structured engagement. Program Promotion & Member Engagement: Promote the mentorship program across the chapter to drive participation, awareness, and engagement among members at all career stages.

	Performance Tracking & Program Evaluation: Track participation, engagement, and feedback to evaluate program effectiveness and identify opportunities for continuous improvement. Cross-Functional Alignment: Collaborate with the Education & Professional Development Director to ensure alignment with broader learning, leadership development, and chapter initiatives. Leadership Development Pipeline: Identify and cultivate future chapter leaders through structured mentorship pathways and intentional development opportunities.
Accountable For	Ensuring effective mentor-mentee matching based on experience, goals, skill sets, and development needs. Maintaining program engagement by ensuring participants are actively supported and mentorship relationships remain productive. Delivering a consistent and high-quality mentorship experience that reflects SMPS-NY standards and member expectations. Tracking participation, engagement levels, and program outcomes to measure effectiveness and impact. Identifying and addressing gaps in participation, satisfaction, or program structure. Ensuring alignment of the mentorship program with SMPS-NY Education & Professional Development strategy and chapter goals. Supporting the development of future chapter leaders through intentional mentorship pathways. Providing feedback and reporting to the Education & Professional Development Director on program performance and improvements.
Notes / Pipeline	*Pipeline: Strong path to Education & Professional Development Director*

Marketing Education & PD Chair

Position Title	Marketing Education & PD Chair
Pillar	*Education & PD Pillar (Reports to Education & PD Director; appointed by President per §6.2) — Non-Voting (attends board meetings)*

Purpose	The unique purpose of the Marketing Education & PD Chair is to build foundational marketing knowledge and capability among early career A/E/C professionals by delivering structured learning opportunities, practical skill development, and accessible educational content that strengthens their understanding of industry marketing principles and prepares them for long-term professional growth within SMPS-NY and the broader A/E/C industry.
Term	*1 year (no term limit; may be renewed)*
Est. Time Commitment	
Qualifications	Active SMPS member
Responsible For	Early Career Marketing Curriculum Development: Create and maintain a structured foundational marketing learning pathway for early career A/E/C professionals that builds core competencies in marketing principles, business development fundamentals, and industry-specific practices. Learning Experience Design & Delivery: Plan, coordinate, and deliver early career-focused educational programming, including workshops, bootcamps, panels, skill-building sessions, and introductory marketing training events. Content Development & Knowledge Translation: Develop accessible, practical learning materials that translate complex A/E/C marketing concepts into clear, entry-level understanding and real-world application. Engagement & Pipeline Development: Drive engagement among early career members by creating intentional touchpoints that support onboarding, retention, and progression within SMPS-NY. Committee Leadership & Collaboration: Lead and coordinate the Early Career Marketing Committee (or equivalent group) to ensure alignment on programming, content development, and member engagement strategies. Industry & Skill Gap Identification: Identify emerging skill gaps and foundational knowledge needs within early career marketers and align programming to address those gaps effectively. Speaker & Practitioner Coordination: Recruit and collaborate with experienced marketing professionals to deliver relevant, practical insights tailored to early career audiences.

	Program Effectiveness Tracking: Measure participation, engagement, and learning outcomes to evaluate the effectiveness of early career development initiatives and inform continuous improvement. Cross-Functional Alignment: Collaborate with the Communications & Marketing Director and other chapter leadership to ensure alignment with branding, outreach, and overall chapter engagement strategy. Early Career Talent Development: Support the long-term growth of early career members by creating clear pathways toward deeper involvement in SMPS-NY programs, leadership opportunities, and advanced professional development.
Accountable For	Developing and maintaining a structured early career marketing learning pathway that builds foundational A/E/C marketing knowledge and skills. Ensuring the consistency, relevance, and quality of educational content delivered to early career members. Driving engagement and participation among emerging marketing professionals in chapter programming and development initiatives. Identifying core competency gaps and aligning programming to address foundational marketing and business development skill needs. Creating accessible learning opportunities that translate industry concepts into practical, entry-level application. Tracking participation, engagement, and learning outcomes to evaluate the effectiveness of early career development efforts. Collaborating with the Communications & Marketing Director to ensure alignment with chapter messaging, branding, and outreach strategy. Supporting pipeline development by strengthening retention and progression of early career members within SMPS-NY. Providing feedback and reporting on program impact, participation trends, and development outcomes to chapter leadership.
Notes / Pipeline	*Pipeline: Strong path to Education & Professional Development Director*

Business Development Education & PD Chair

Position Title	Business Development Education & PD Chair
Pillar	*Education & PD Pillar (Reports to Education & PD Director; appointed by President per §6.2) — Non-Voting (attends board meetings)*
Purpose	The unique purpose of the Business Development Education & PD Chair is to strengthen the business development capability of SMPS-NY members by building their confidence and competence in winning work, developing client relationships, and executing effective pursuit strategies that directly contribute to the growth and success of A/E/C firms.
Term	*1 year (no term limit; may be renewed)*
Est. Time Commitment	
Qualifications	Active SMPS member
Responsible For	Business Development Strategy & Program Development: Design and implement an annual business development learning and engagement strategy that aligns with SMPS-NY professional development goals and strengthens members' pursuit and client growth capabilities. Pursuit Strategy & Skills Development: Develop and deliver programming focused on core business development competencies, including client relationship building, opportunity identification, capture planning, and proposal strategy. Client Growth & Relationship Education: Create learning opportunities that help members strengthen long-term client development skills, including networking, positioning, trust-building, and account management. Programming & Learning Experience Delivery: Plan and facilitate workshops, panels, and training sessions that translate business development theory into practical, real-world application for A/E/C professionals. Industry Trends & Market Intelligence Integration: Identify emerging trends in A/E/C business development and incorporate relevant insights into programming to keep content current and impactful. Committee Leadership & Collaboration: Lead and coordinate the Business Development Committee to ensure alignment on

	programming, content development, and member engagement strategies. Speaker & Practitioner Engagement: Recruit and collaborate with experienced business development professionals to provide actionable insights and real-world perspectives. Performance Tracking & Program Evaluation: Measure participation, engagement, and learning outcomes to evaluate the effectiveness of business development initiatives and guide continuous improvement. Cross-Functional Alignment: Collaborate with Communications & Marketing, Education & Professional Development, and other chapter leadership roles to ensure integrated programming and consistent messaging. Applied Learning & Career Impact Focus: Ensure all initiatives translate into practical, actionable skills that members can apply directly within their firms to support revenue growth and career advancement.
Accountable For	Developing and maintaining a business development learning and engagement strategy aligned with SMPS-NY professional development goals. Ensuring programming consistently builds core competencies in client development, pursuit strategy, relationship building, and proposal positioning. Designing and overseeing educational content that strengthens members' ability to identify and convert business opportunities. Tracking engagement, participation, and outcomes to evaluate the effectiveness of business development initiatives. Identifying industry trends and skill gaps in A/E/C business development and aligning programming accordingly. Collaborating with chapter leadership to ensure business development initiatives are integrated into broader education and marketing efforts. Supporting consistency and quality across all business development-related programming, workshops, and discussions. Providing feedback and reporting on program impact and member development outcomes to the Education & Professional Development Director. Ensuring initiatives translate directly into actionable skills that members can apply in their firms and careers.

Notes / Pipeline	*Pipeline: Strong path to Education & Professional Development Director*

REFERENCE DOCUMENTS INDEX

This document references the following SMPS HQ and NY chapter materials. Board members and chairs should consult these sources for detailed guidance on any responsibility listed in their role description.

- **HQ Model Chapter Bylaws (January 2026):** Governing framework for all chapters. Board composition, officer roles, terms, eligibility, committees, elections, fiduciary controls.
- **HQ Chapter Bylaws Implementation Guide:** Step-by-step adoption instructions. What can/cannot be customized, board review, member vote, suggested timeline.
- **HQ Bylaws Rollout Presentation:** Summary deck: HQ model bylaws overview, timeline (complete by August 31), key FAQs.
- **SMPS Chapter Affiliation Agreement (2025, NY/NC):** Chapter-HQ relationship: recruiting, programming, certification support, reporting, branding, regional conference participation, and HQ obligations (rebates, leadership engagement, membership support).
- **Chapter Leader's Code of Conduct:** Ethical/behavioral standards. Duty of care, loyalty, obedience, conflict of interest, DEI, respectful conduct, social media. Must be signed by all board members and volunteers.
- **SMPS Healthy Chapter Checklist:** Self-audit: Communications, Education & Programming, Finance & Administration, Governance & Strategic Planning, Membership, Recognition & Sponsorship. DEI woven into each.
- **Governance & Strategic Planning Manual (2025–26):** Board roles, strategic planning, bylaws overview, affiliation agreement context.
- **Finance & Administration Manual (2025–26):** IRS filing (Form 990), treasurer duties, financial policies, segregation of duties, registered agent, paid staff/contractor guidance.
- **Education, Programming & Certification Manual (2025–26):** 11-step program planning, CEU/AIA LU requirements, speaker management, engagement strategy, regional conferences.
- **SMPS Standards for Learning:** Adult learning principles: participant-directed, multiple styles, defined objectives, impartial speaker selection, content that transforms businesses.
- **SMPS Domains of Practice (2024):** Six domains: (1) Research, (2) Planning, (3) Client & Business Development, (4) Proposals, (5) Promotional Activity, (6) Management. Programming must cover each at least once per year.
- **CPSM Handbook (September 2023):** Eligibility, exam content (mapped to 6 Domains), recertification (50 CEUs/3 years), study groups, Code of Ethics.
- **Communications Manual (2025–26):** Chapter comms strategy, branding guidelines, social media, newsletter, website, email, HQ content resources.
- **Membership Manual (2025–26):** Recruitment, retention, new member orientation, member data/extranet, demographics, HQ support.

- **President-Elect Checklist / Playbook:** Governance, financial, membership, programming, communications, compliance checklist. Key milestone timeline.
- **SMPS-NY Chapter Bylaws (adopted September 16, 2026):** The chapter's governing document. Amendments require a majority recommendation of the full Board, SMPS approval, 30 days' notice to members, and a majority member vote with at least 20% of voting members participating (Article XII).
- **Strategic Planning Toolkit (2022):** Five-phase planning process and Healthy Chapter Checklist integration.
- **SMPS-NY Board Brainstorm Document (Option 2):** Proposed streamlined board structure, pillar definitions, committee chairs, bylaw committee meeting notes.