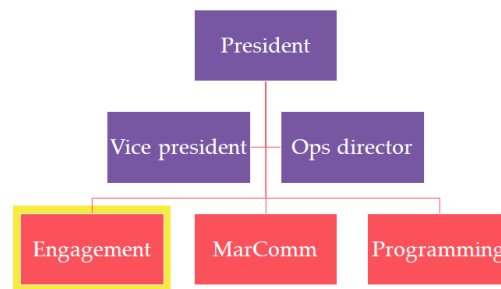


# TEST ONLY - Do not refer to

Last Modified on 08/26/2020 9:41 am EDT

The Engagement DAL is the chapter leader responsible for all member recruitment/engagement and volunteer placement, tracking and recognition activities in the local area to attract new members and ensure member satisfaction/retention.

## Engagement DAL role description



### Chapter leadership responsibilities

- A chapter board leader responsible for positively representing HBA in their local geography and driving the HBA value proposition
- Assists in the development of chapter strategies and goals, providing functional expertise and guidance on regional priorities and giving regular updates on progress
- Stays up to date on relevant updates and collaborates openly with fellow engagement leaders across chapters via participation on Regional Engagement meetings

### Functional responsibilities

- Provides member/volunteer engagement expertise in chapter strategic planning and initiative development and ensures compliance with HBA standards/policies
- The leader for all membership and volunteer engagement initiatives in the area, this DAL translates regional engagement goals and priorities into initiatives relevant to their local area and supports the staffing needs of other chapter teams
- Drives teams in the execution of various engagement initiatives determined by the chapter board

### Team management responsibilities

- Recruits, trains and manages a team of up to four committee chairs, with committees beneath them, to execute on determined local engagement initiatives
- Delegates work to committee chairs and teams as much as possible
- Supports, guides and mentors team members in their HBA and leadership journey
- Proactively succession plans, identifying and grooming their successor to easily step into their role when they move on

### Skills that will be built in this role:

- Delegation and people management
- Strategic planning and execution
- Interviewing and staffing
- Training

- Policy adherence

**Typical succession:** individuals in this role often step next into a chapter executive committee role or a regional director role within the Engagement COE

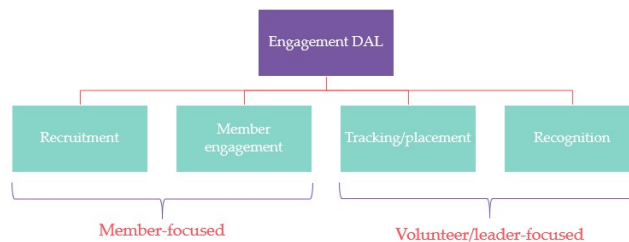
**Time commitment:** 2-4 hours per week average

## Engagement DAL reporting and connection points

<b>Directly reports to:</b>	Chapter executive committee
<b>Dotted line reports to:</b>	Regional Engagement COE president and vice presidents

<b>Also interacts with:</b>	<b>For/reason:</b>
Other chapter board members	strategic planning and board meetings
Programming DAL	event needs and collaboration
MarComm DAL	marketing material and communications needs
Chapter vice president	budgetary needs/understanding
Other Engagement DALs	collaboration, coordination and best practice sharing
Engagement COE regional directors	as needed, to understand regional priorities, better plan/execute local initiatives and ensure necessary connects made with committee chairs
Corporate Relations regional directors	for HBA introductory event coordination and support

## Engagement DAL committees and detailed tasks



**Recruitment:** HBA introductory events and other recruitment strategies

- Identification for opportunities to hold HBA introductory events:
- Collaboration with corporate relations to provide Lunch & Learns within local companies
- Planning of in-person and virtual Meet the HBA/engagement events to recruit other local new members and show them the value of HBA
- Lead all HBA introductory events by delivering the content to explain the organization, sell the value proposition and share ways for individuals to get involved
- Execute other local recruitment initiatives as needed in line with regional priorities and chapter goals to find new members
- **Regional connection:** Prospecting and recruitment regional director, Engagement COE

#### Member engagement: member orientation/other engagement initiatives and volunteer recruitment

- Plan and execute local new member orientations to guide recently joined members through the organization and how to make the most of their membership
- Attend local HBA events and practice radical hospitality, ensuring all attendees make connections and that no attendee leaves unsatisfied
- Actively sell the value proposition of volunteering, recruiting members into volunteer and/or leadership roles
- Execution of other local member engagement initiatives as needed in line with regional priorities and chapter goals to ensure member satisfaction and engagement
- **Regional connection:** Engagement and retention regional director, Engagement COE

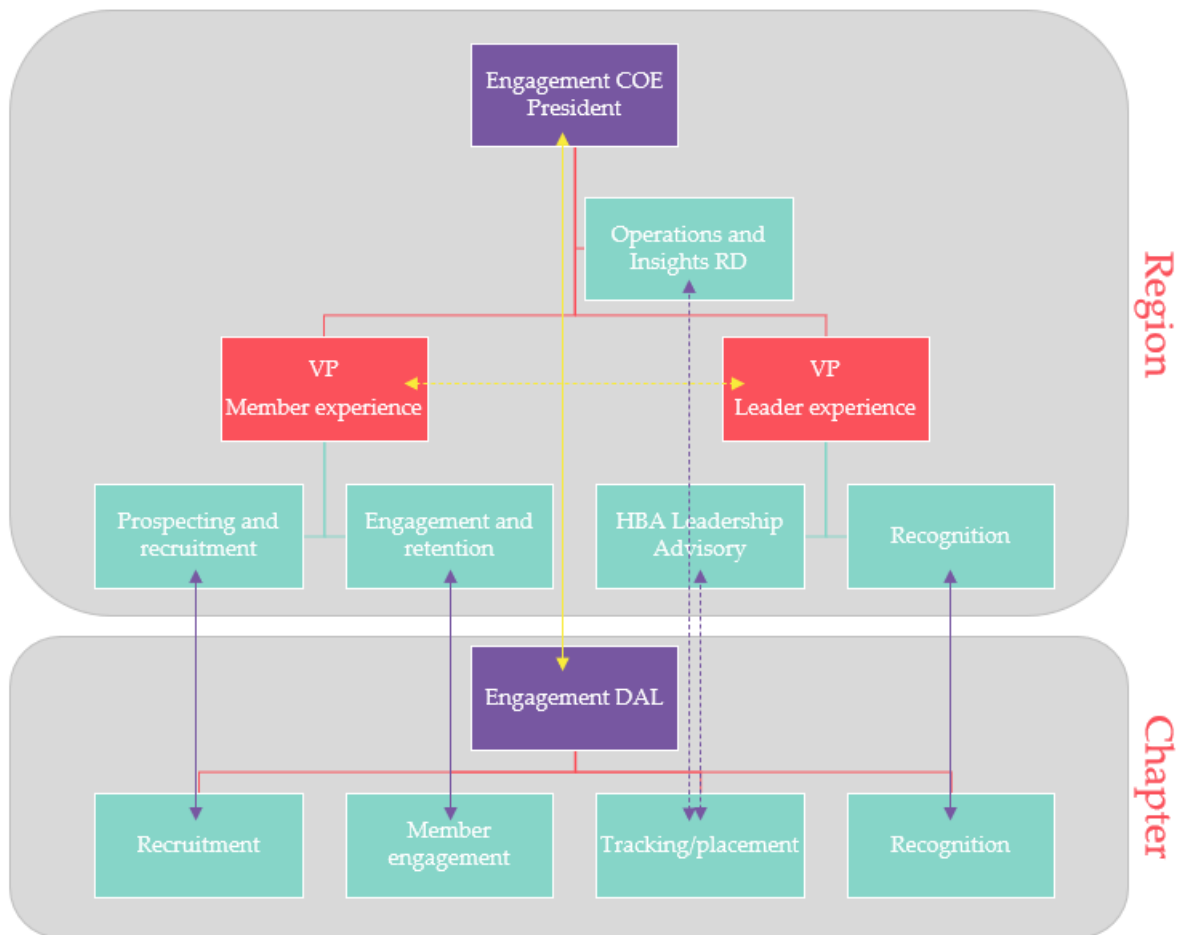
#### Tracking and placement: volunteer and leader administration, support and connections

- Works to maintain an accurate database of local volunteers/their roles and up-to-date knowledge of volunteer staffing needs across all chapter functional areas
- Interacts as needed with new potential volunteers, guiding them through available volunteer opportunities that fit their personal needs/goals to find the best fit and get them involved
- Gathers feedback from chapter volunteers to gauge volunteer satisfaction and opportunities for improvement
- Connect new volunteers to necessary chapter DAL and/or committee chairs to be on-boarded
- **Regional connection:** Engagement Ops/Insights regional director and HBA Leadership Advisory regional director (as appropriate), Engagement COE

#### Recognition: recognizing local volunteers for their outstanding efforts

- Leads all volunteer recognition and awards initiatives within the chapter
- Prompts chapter leaders and committees when opportunities for recognition are available
- Manages the entire recognition process from submissions to rewards fulfillment, working with other functional areas as needed to ensure recognition are communicated to the local membership (via MarComm) and at events (via Programming)
- **Regional connection:** Recognition regional director, Engagement COE

### Regional connection points graphic:



## Engagement DAL training and resources

Please complete the following training modules to fully onboard yourself to your role, responsibilities and resources to help you along the way:

1. Getting your bearings
2. Module 1 - TBD - Chapter leadership overview
3. Module 2 - TBD - Engagement overview
4. Module 3 - TBD - Working with the region
5. Module 4 - TBD - Building and leading a team
6. ... more TBD....

The following places within the HBA Resource Center should be reviewed and are available to you for future reference:

- [Engagement best practices, tips and tricks](#)
- [Membership resources](#)
- [Volunteer engagement resources](#)
- Engagement policies (being re-done)
- [Quick reference and how-tos](#)

