

## **Advisory Team Responsibilities & Commitments**

1. Attend the annual advisory team retreat and 75% of bimonthly meetings
2. Commit to 4-6 hours per month on advisory teamwork.
3. Be well-versed in the mission and work of The Operating Project.
4. Be a strategic volunteer at events or in an advisory team role
5. Give financially to the organization at a meaningful level to you. Support the financial stability of the organization through supporting fundraising efforts/events.
6. Commit to a 1-year term or until transitioned to a governing advisory team
7. Commit to ensuring responsible hand-off to governing advisory team when appropriate

## **Duties of the Advisory team**

1. Take care of the Operating Project by advising prudent use of all assets, including facility, people, and good will.
2. Advise decisions in the best interest of The Operating Project.

## **3 Roles of Committed Advisory team Members**

Advisory team members fill three important roles. Advisory team members are:

1. Ambassadors
2. Advocates
3. Askers

## **What You Actually Do on Advisory team**

1. **Determine mission and purpose.** It is the advisory team's responsibility to create and review a statement of mission and purpose that articulates the organization's goals, means, and primary constituents served.
2. **Ensure effective planning.** Advisory teams must actively participate in an overall planning process and assist in implementing and monitoring the plan's goals.
3. **Monitor and strengthen programs and services.** The advisory team's responsibility is to determine which programs are consistent with the organization's mission and monitor their effectiveness.
4. **Ensure adequate financial resources.** One of the advisory team's

foremost responsibilities is to secure adequate resources for the organization to fulfill its mission and connect the organization to both funders and funding sources. Part of this includes giving of personal finances to a level that is meaningful to you.

5. **Protect assets and provide proper financial oversight.** The advisory team must assist in developing the annual budget and ensuring that proper financial controls are in place.
6. **Build a competent advisory team.** All advisory teams have a responsibility to articulate prerequisites for candidates, orient new members, and periodically and comprehensively evaluate their own performance.
7. **Ensure legal and ethical integrity.** The advisory team is ultimately responsible to adhere to legal standards and ethical norms.
8. **Enhance the organization's public standing.** The advisory team should clearly articulate the organization's mission, accomplishments, and goals to the public and garner support from the community.

## Advisory team Positions

### Chair Job Description

- Oversees advisory team
- Works in partnership with the director to make sure advisory team resolutions are carried out, meeting with director at least once per month
- Calls special meetings if necessary
- Works to recruit new advisory team members
- May act as an alternate spokesperson for the organization
- Periodically consults with advisory team members on their roles and helps them assess their performance
- Connects community and corporate partners with The Operating Project.

### Secretary Job Description

- Attend all advisory team meetings
- Ensure the safety and accuracy of all A-Team records
- Keep advisory team minutes
- Appoint another member of the advisory team to review minutes if secretary absent
- Review advisory team minutes
- Make minutes available for review

### Financial Advisor Job Description

- Attend all advisory team and finance committee meetings
- Maintain knowledge of the organization and personal commitment to its goals and objectives
- Understand basic financial accounting for nonprofit organizations
- Maintain access to all financial accounts
- Work with the executive and the chair to ensure that appropriate financial reports are made available to the advisory team on a timely basis

### **Marketing Chair Job Description**

- Attend all advisory team meetings
- Commit 1-2 hours **per week** to assist with marketing and communications for the organization
  
- Must be well-versed in how to communicate The Operating Project's mission and activities to donors and partners
- Work with The Operating Project staff to ensure timely creation of marketing materials, website updates, social media, etc.
- Maintain access to all The Operating Project media accounts (email, social media)

### **Events Chair Job Description**

- Attend all advisory team meetings
- Help ensure event logistics are adequately planned
- Promote fundraising and awareness events
- Lead delegate 2 fundraising events per year

### **Sales Development Job Description**

- Attend all advisory team meetings
- Help develop and design sales systems
- Train staff on sales techniques
- Aid in development of sales pipeline