**Sample Scope of Work**

**Membership Support**

* Respond to requests for information within a 24-hour period, if not sooner.
* Maintain accurate, up-to-date membership records.
* Develop and maintain member and prospect databases.
* Continuously update online membership directory.
* Process member applications.
* Produce and maintain membership materials and supplies for prospects and new members.
* Work with appropriate task forces to design, deliver and tabulate membership satisfaction or needs assessment surveys.
* Provide monthly membership reports.
* Work with membership committee to follow up on “non-renewed” members.
* Coordinate exit interview calls to be made by Membership Recruitment & Retention Task Force members.
* Identify and recommend member benefits/opportunities/services that strengthen member educational and networking opportunities.
* Manage new member onboarding process.
* Manage relationships with affinity partners offering member benefits.
* Manage dues renewal process.
* Develop and implement campaigns directed at increasing and/or retaining the Association’s membership.

**Financial/Business/Legal Support**

* Recommend, review, draft and uphold Association policies and procedures.
* Document all financial processes and update as needed.
* Inform Association Secretary/Treasurer on financial processes.
* Develop Association annual budget in conjunction with the Finance Committee.
* Assist the Association and Task Forces in developing and maintaining special project budgets as necessary.
* Provide the Board with monthly financial reports, preparing financial metrics, cash flow statements and projections as needed.
* Review monthly financial statements with Association Secretary/Treasurer.
* Prepare end of year variance report with Association Secretary/Treasurer.
* Issue all invoices for services rendered, including, but not limited to dues, events and advertising revenues and follow up on all collections.
* Supervise and coordinate accounts receivable.
* Supervise and coordinate accounts payable to insure accurate and timely payment of Association expenses.
* Receive, report and deposit all cash receipts.
* Coordinate with CPA and/or Secretary/Treasurer the filing of all necessary State and Federal tax forms.
* Maintain and manage relationships with vendors to provide service in a cost-effective manner.
* Monitor necessary insurance coverage and make recommendations to the Executive Committee/Board of Directors.
* Notify the Executive Committee/Board of Directors of any financial concerns/opportunities.
* Provide annual report of Association performance and statement of changes in financial position.
* Make recommendations to the Secretary/Treasurer regarding sound financial management concerning cash flow and investments in accordance with Association policies.
* Monitor disbursements with the designated members(s) signatures(s) on all checks.
* Work with the appropriate task force(s) to identify programs/services to generate non-dues dollars for the Association.
* Coordinate activities regarding the annual audit or review and assist auditors with annual audit or review.
* Develop and monitor the budget/financial plan for events.
* Set up and manage bank accounts(s).
* Reconcile bank statements monthly.
* Process credit card transactions.
* Secure and facilitate legal counsel as needed.
* Investments – provide status reports and recommendations as needed.

**Educational Support**

* Work with Task Forces to brainstorm topics of potential webinars.
* Identify and research potential speakers for webinars.
* Coordinate potential speakers and topics with member identified areas of interest to develop webinars.
* Develop webinars for new member benefits and programs.
* Negotiate speaker fees and contracts.
* Promote webinars to members and other related organizations’ members.
* Coordinate dry run and training of speakers on webinar system.
* Manage invitations and evaluations for webinars.
* Finalize recording and any related materials for Association website for purchase after the fact.
* Solicit sponsorship, when appropriate, and coordinate sponsor recognition activities.

**Event Support**

* Perform site-inspections/solicit facility bids, negotiate contracts and make recommendations to the Board.
* Responsible for all logistics of all meetings, including A/V and food/beverage.
* Provide advance and on-site registration services.
* Design, produce and distribute promotional materials.
* Receive, process and confirm meeting registrations.
* Work with appropriate Task Forces to coordinate volunteer/staff responsibilities.
* Coordinate speaker contracts, travel arrangements and follow up for events.
* Draft initial meeting budgets and work with appropriate Task Force chairs to finalize budgets.
* Develop and implement campaigns directed at generating event-related income through attendee registrations, sponsorships, and other identifiable sources.
* Manage all monies collected and owed.
* Solicit sponsors and coordinate all sponsorship registrations, recognition, and benefits.
* Solicit exhibitors, manage exhibit hall floorplan and coordinate all exhibitor registrations, recognition and benefits.
* Facilitate coordination with decorator to produce exhibit floorplan, obtain fire marshal approvals, design an exhibit kit and onsite logistics at the event.
* Prepare projection document for appropriate task force and board review during the months preceding the conference.
* Prepare final meeting accounting.
* Aid Board and Task Forces in event/program planning.
* Distribute and collect event evaluations, summarizing results and trends for Board review.
* Attend and provide reasonable staff support at events. Coordinate all mailings and communications to members and prospective members.
* Manage production of event materials including save the date communications, registration materials, onsite materials, speaker invitations, exhibitor-sponsor communications, website, social media and conference signage.
* Draft script for all events for key leadership.
* Prepare post event acknowledgements for volunteer signature, including thank you communications to speakers, volunteers, exhibitors, sponsors, and others as applicable.
* Assist in program and schedule development for all events.
* Apply for CEU credit for qualifying educational sessions.
* All the production of annual conference materials should be repeated for regional conference materials, including takeaway resources that are developed for each regional.
* Coordinate volunteer activities in conjunction with events.
  + Program development for all events.

**Board/Governance/Leadership Support**

* Provide administrative support for Association Board, Executive Committee, Committee and task force activities.
  + Provide professional staff liaisons for committee and task forces to attend meetings, assist chairs as needed, providing staff leadership on strategic initiatives.
  + Regularly meet with and advise the Chair as needed.
  + Attend and provide executive staff liaisons for all Board, Executive Committee, and Finance Committee activities.
  + Arrange for conference facilities, when appropriate and necessary for Board and Leadership meetings.
  + Maintain copies of committee, task force and Board rosters and meeting minutes for master Association files.
  + Prepare initial agenda for board meetings and work with Board Chair to finalize.
  + Coordinate and distribute Board notices and meeting materials.
  + Prepare Board communications in between meetings to communicate leadership issues and decisions.
  + Coordinate annual review of Association Strategic Plan, coordinating logistics, and securing/negotiating facilitator fee, when appropriate.
  + Track Committee and Task Force progress on strategic initiatives and regularly report to the Board and members.
  + Set up teleconference calls for all Association meetings.
  + Provide assistance and oversight to committees and task forces as to financial and policy issues.
  + Coordinate Board, committee and task force activities.
  + Offer suggestions for and participate in leadership training programs for the Association.
  + Provide logistical and procurement support for leadership training programs.
  + Work with the Executive Committee/Board in establishing short and long-term plans for the Association. Maintain the master copy of the Association Strategic Planning document.
  + Take, transcribe and issue minutes of Executive Committee and Board of Directors’ meetings.
  + Work closely with Nominating Committee in organizing and implementing the election process.
  + Facilitate the online balloting process of annual elections.
  + Prepare candidate profiles, etc., for elections process. Review/revise and distribute Nomination form for annual election.
  + Maintain board history including terms, offices served and coordinate validation process, as needed.
  + Work closely with Chair/Vice Chair in identifying committee and task force chairs and volunteer leadership.
  + Identify issues for Nominating Committee, with recommendations for bylaws changes, updates and interpretation of clauses.
  + Offer timely and reliable information to Committees and Task Forces to enable an efficient and effective decision-making process.
  + Offer staff perspective on organizational priorities and challenges.
  + Foster strategic thinking that is consistent with Association missions/values and available resources.
  + Prepare association policies and procedures to document Association activities and initiatives.
  + Draft and clarify leadership roles and responsibilities for staff versus volunteers for board, task force and annual meeting activities.
  + Maintain Association bylaws, making recommendations for periodic review and updates.
  + Coordinate and produce online membership directory.
  + Research and recommend new programs and services.
  + Maintain reference materials available in the leadership only section of the website, uploading new information as it is developed.

**Communication Support**

* Discuss with newsletter vendor any potential advertisers.
* Write association “internal” articles for newsletter, including newly joined members, board highlights, and meeting summaries.
* Compile press releases submitted to Association for publication on the website and forward to newsletter vendor for inclusion in the newsletter/e-newsletter.
* Source articles from Google alerts and other industry sources to feed into eNews.
* Determine and maintain production schedule, reminding all involved of relevant deadlines.
* Coordinate information from task force chairs on task force activities.
* Coordinate edits to articles for newsletter/e-newsletter.
* Assist appropriate contacts in identifying timely articles and contributing authors for newsletter copy.
* Work with the appropriate task force to design and develop expanded content for the newsletter.
* Forward updated membership email lists to newsletter vendor for distribution of the newsletter via email.
* Update the Association website, as needed. Coordinate any update or redesign of the Association website to meet association needs as defined by strategic initiatives.
* Coordinate distribution of press releases, as needed.
* Manage relationship with website provider to troubleshoot any errors or problems on the website.
* Maintain Association blog.
* Maintain Association presence on various social media sites, including but not limited to Facebook, Twitter and LinkedIn.
* Manage publication schedule.
* Prepare speaking points and brief leaders for media interviews.
* Provide information to media re: general information on the industry, based on the latest industry statistical information available.
* Monitor member discussions via social media, promoting Association events and resources as much as possible.
* Promote Association events and activities via social media, including members-only social media sites.
* Create and maintain monthly social media calendars.
* Coordinate member insights/perspectives for articles.

**Operational Support**

* Provide an office address and headquarters for the Association.
* Provide daily availability of professional staff.
* Provide Accounting Department staff time.
* Provide consulting services from staff CPA expertise or partner/owner, as needed.
* Provide receptionist time, as appropriate.
* Provide membership services support.
* Provide storage space for all Association materials.
* Provide conference room facilities for Association officers and task forces.
* Coordinate with outside vendors as appropriate and communicate to leadership on status.