1. **General Office & Administration**
   1. Maintain the headquarters office, including permanent mailing address and ASSN NAME telephone number/system
   2. Provide professional staff management and support
   3. Manage projects and programs in accordance with ASSN NAME policies
   4. Handle business correspondence and general inquiries
   5. Maintain a sufficient supply of ASSN NAME letterhead, notecards, envelopes and other supplies
   6. Consult with legal counsel as necessary
   7. Train the ASSN NAME staff on procurement, association management, and customer service
   8. Maintain a database of ASSN NAME’s current, former, and prospective members
   9. Distribute information to members as needed
   10. Maintain the Articles of Incorporation, Bylaws, insurance policies
   11. Maintain current and archived files (paper and electronic)
   12. General administrative support as needed
   13. Track and report on progress on ASSN NAME’s strategic initiatives and KPIs
   14. Coordinate a comprehensive annual survey of ASSN NAME members to measure satisfaction and assess member needs; summarize finding in a Board dashboard or report
   15. Coordinate an annual Board assessment survey and review results with the Board
2. **Executive Committee & Board of Directors**
   1. Schedule and facilitate conference calls and meetings
   2. Develop and distribute agendas, materials and reports within ASSN NAME’s established timelines
   3. Track attendance; prepare and distribute minutes
   4. Record action items and follow up as necessary
   5. Maintain the Board Community on the ASSN NAME website
   6. Maintain governance documentation, including articles of incorporation and bylaws
   7. Maintain the Board policies manual and ensure completion of required forms annually
   8. Coordinate strategic planning initiatives
   9. Plan and execute Board Orientation for new Board members
   10. Provide guidance on the task force/committee structure and support the appointment/invitation process
   11. Hold regular calls with the Chair and Chair-Elect
   12. Provide support for the ASSN NAME Chair as needed
   13. Assist the board in strategic planning, financial planning, and goal setting
   14. Provide staff member to attend Board of Directors meetings to take minutes and distribute minutes with action item list to the secretary within 15 workdays after the meeting Upon the secretary's approval, minutes will be posted in the Board of Directors group on the website
   15. Serve as the “face” of the Association by working with ASSN NAME leaders and partners to identify opportunities for speaking engagements and other activities that will promote the mission of the association
   16. Coordinate annual Executive Committee retreat
3. **Financial Management** 
   1. Code and process checks sent to ASSN NAME
   2. Review, code, verify and process invoices and expense reimbursement for payment
   3. Maintain an accurate general ledger and chart of accounts
   4. Prepare the annual budget in coordination with the ASSN NAME Treasurer
   5. Monitor the budget and report variances
   6. Post the monthly dashboard report in the Board group on the website
   7. Maintain bank accounts/reconciliation
   8. Maintain appropriate professional liability, general liability, and Directors & Officers insurance policies
   9. Support the independent Certified Public Accountant in performing the ASSN NAME annual audit
4. **Membership**
   1. Maintain an accurate database of member records, activities and transactions
   2. Make updates to the member records when requested
   3. Provide standard reports from the member database based on multiple factors such as membership type, conference attendance, groups, and other demographic information
   4. Process new member applications and manage the new member welcome process
   5. Produce member certificates/letters/welcome newsletters
   6. Prepare, distribute and process annual dues renewal notices
   7. Manage payment plans
   8. Manage dues invoicing and payment processing
   9. Issue refunds as needed
   10. Assist in communicating the value of ASSN NAME membership
   11. Respond to member inquiries in a timely manner
   12. Support annual Member Satisfaction and Needs Assessment survey
   13. Manage the Member Directory
   14. Reply to general ASSN NAME inquires
5. **Additional Membership**
   1. Tier 4 Membership
      1. Maintain relationship with current business partners
      2. Ensure annual review is completed
   2. Tier 3 Membership
      1. Build and maintain relationships with partners
      2. Identify new potential partners and hold calls to determine mutual interest
      3. Ensure timely and accurate execution on deliverables
      4. Implement frequent communications to partners to monitor and ensure satisfaction of deliverables
      5. Monitor and evaluate revisions to programs that will increase partner satisfaction
      6. Plan, coordinate and conduct an annual review of partnership agreements
      7. Coordinate annual campaign for partners to continue support of ASSN NAME
   3. Tier 2 Membership
      1. Build and maintain relationships with leadership circle members
      2. Respond to requests for information from potential Tier 2 members
      3. Ensure timely and accurate execution on deliverables
      4. Ensure satisfaction of deliverables
      5. Liaison with Tier 2 Member Committee to update the programs to increase partner satisfaction
      6. Establish annual sign off of Tier 2 member benefits.
      7. Coordinate annual campaign continue/increase support of ASSN NAME
   4. Tier 1 Membership
      1. Respond to requests from current and prospective Tier 1
      2. Build relationship; work toward moving Tier 1 to Tier 2
6. **Accreditation & Standards**
   1. Maintain ASSN NAME’s accreditation developer standards per XXXX standards
   2. Process new applications, renewals, and reaccreditations
   3. Collect, process, code, and track annual maintenance fee
   4. Prepare notification emails and press releases for designated members
   5. Prepare reports on accreditation
   6. Accurately speak to the accreditation process and answer challenging and unique applicant questions
   7. Market the value of Accreditation to ASSN NAME members and non-members
   8. Develop and implement a marketing plan to expand the Accreditation program
   9. Arrange Accreditation Workshops as requested
7. **Marketing**
   1. Develop and implement an annual marketing plan
   2. Coordinate the work with marketing firm
   3. Issue press releases as needed
   4. Weekly calls with marketing firm to ensure projects are on track to meet deadlines
   5. Manage and coordinate content development throughout all ASSN NAME assets (meetings, webinars, monthly/quarterly newsletters, incoming member news, industry collaboration
   6. Manage ASSN NAME’s event marketing plans (ASSN NAME presence at industry events)
   7. Assist marketing firm with development and visioning for marketing and communications plans for all ASSN NAME strategic deliverables
   8. Work with marketing firm to review or approve press releases, marketing material, and other important communications
   9. Work with marketing firm to ensure necessary staff support to deliver on marketing strategy & brand consistency
   10. Develop content in alignment with ASSN NAME programs
   11. Monitor and review content opportunities to drive ASSN NAME thought leadership including ongoing monitoring of key industry and trade press, newsletters and online platforms
   12. Creation, curation, and sharing of content that will aid in positioning the members of organization as thought leaders
   13. Recommending outside thought leaders for content curation
   14. Ensure ASSN NAME website is SEO optimized
   15. Develop SEM campaign
   16. Data acquisition; internal and external – determining where we have holes to fill and how best to obtain needed data
   17. Establishment/management of ASSN NAME’s content repository
   18. Gather and repurpose content acquired from ASSN NAME events
   19. Secure content source opportunities from upcoming event speakers
   20. Identify member spotlight candidates and stories
   21. Compile member feedback from call for content act
       1. Firm
          1. Continue to build on the relationship with established firm
          2. Annually renegotiate contract for marketing firm services
       2. Public Relations
       3. Brand Outreach
          1. Send all new applications to marketing team for review
          2. Maintain brand oversight via ongoing review and update
          3. Brand Administration
          4. Ensure aligned application across all communications channels
          5. Monitor and respond to community engagement
             1. Speaking
             2. Attending

Event 1

Event 2

* + 1. Website
       1. Maintain website content and functionality
       2. Update website content on a monthly basis to keep the website current and ensure content is relevant to member and stakeholder needs
       3. Monitor Google Analytics to identify trends; adjust content to reflect traffic trends
       4. Post relevant press releases and/or member news as needed
       5. Determination of ASSN NAME response tactics for website and social platform interactions
       6. Liaison with vendor for oversite of ongoing development & refreshment of website
       7. Webpage content management
       8. Continue to enhance the ASSN NAME website experience
    2. Social Media
       1. Maintain relevant social media channels to promote ASSN NAME
       2. Creation, curation, and sharing of content that will aid in positioning the members of organization as thought leaders
       3. Monitor/increase engagement on social media with strong ASSN NAME presence
    3. Newsletter
       1. Create content, edit, design, and produce a monthly e-newsletter
       2. Work with Board and Executive Committee on monthly write up for newsletter
       3. Work with the newsletter team to ensure their monthly content is submitted on time and included in the newsletter
       4. Maintain an accurate list of recipients
       5. Distribute the e-newsletter to members and subscribers
    4. Quarterly Newsletter
       1. Program content provided by marketing firm
       2. Maintain an accurate list of recipients
       3. Distribute the e-newsletter to members

1. **Meetings & Events**
   1. Develop and distribute RFP for ASSN NAME events
   2. Research and conduct site selection
   3. Develop conference timeline of action items leading up to the event
   4. Negotiate and contract for meeting space, hotel accommodations, audio/visual services, food and beverage, speakers and other requirements
   5. Support the conference content delivery team in selecting educational program topics, content, speakers and panelists
   6. Create programs, name badges, names tents, folders, and other materials as required
   7. Manage pre-conference and onsite logistics, including registration, lodging, meals, room sets, materials, marketing, audio/visual, transportation, and special events
   8. Provide staff for onsite management and coordination
   9. Coordinate member and staff travel and lodging arrangements
   10. Build online registration
   11. Respond to registration questions in a timely manner
   12. Invoice sponsors and follow up with any unpaid sponsor
   13. Manage sponsor benefits which include: sponsor logo and information on the website, gather the marketing materials for distribution, registration, logistics communications, sponsor advertorials onsite, script dissemination, etc
   14. Develop, administer and prepare a final report of event evaluations
   15. Handout Materials – collection, preparation and printing of materials as needed
   16. Signage - provide overall coordination to ensure signs are designed and printed
   17. Reconcile and ensure all conference invoices are paid timely
   18. Schedule and participate in event planning calls
   19. Work with software team on app content, timeline, execution and onsite support
   20. Coordinate with speakers on logistics, audiovisual, and materials
2. **Committees & Task Forces**
   1. Develop comprehensive charters that define the scope, responsibilities, and authority
   2. Assist in the development and tracking of action plans
   3. Schedule and facilitate conference calls and meetings
   4. Develop and distribute/post agendas, materials and reports
   5. Record action items and follow up as necessary
   6. Maintain the committee/task force groups on the ASSN NAME website
   7. Prepare reports and assist in achieving action plan objectives and deliverables
   8. Manage the call for volunteers and actively recruit participants
   9. Orient new committee and task force members
   10. Update charters as needed
3. **Research**
   1. Assist in determining annual research project
   2. Research firms that could potentially manage the project
   3. Develop and distribute RFP to qualified research organizations
   4. Review proposals and make recommendations to the Board
   5. Award business and inform other contenders
   6. Initialize research project; work with vendor to provide necessary information
   7. Monitor progress of the project
   8. Review preliminary results; make recommendation on edits
   9. Deliver report to the Board
   10. Consult with marketing firm on a plan to disseminate results/insights to members and other interested parties