

ISM – Kansas City Executive Administrator Statement of Work

Summary: The Executive Administrator (EA) provides administrative services and functional support to the ISM-KC Affiliate. The EA is compensated monthly to perform the tasks that are estimated to take about 20-25 hours per month. The EA will report directly to the 1st Vice-president, however, ISM-KC Directors will ask the EA to perform work that is outlined in the following statement of work:

1. In support of the Board of Directors

Attend Board Meetings – Monthly

- Ensure alignment with ISM-KC Mission, Goals and Objectives.
- Support the ISM-KC Board of Directors as necessary (all standing committees and special ad hoc committees).
- The Administrator must provide back-up coverage when a conflict may arise.

Attend Strategic Planning Session(s) – As required

- Provide reports as required to various standing committees for strategic planning.
- Continually improve the Administrative duties and responsibilities to the standing committees and Directors.

Reconciliation of the ISM Roster twice a year

- Reconcile (on line with ISM-International) the ISM-KC member roster with the ISM-International member roster to insure the records are accurate – twice a year in January and July to be reported to ISM-International in February and August.

Membership dues billing – Monthly (most activity is semi-annual)

- Prepare invoices for members whose anniversary date is set to expire 60 days before their expiration date.
- Send invoices monthly via CVENT
 - 60 days and again at 30 days before expiration date.
 - At expiration date, send a Deletion Notice and invitation to renew
 - Delete unpaid members from local database and ISM database prior to semi-annual reconciliation.
 - Prepare Non-Renewal Report for inclusion in the next Report to Membership Director.

- Send CVENT survey to non-renewals

Member Surveys

- Develop miscellaneous surveys in CVENT as directed by the Board of Directors. This will include the following:
 - Create survey in CVENT
 - Execute survey and follow-up as necessary to insure the survey is successful
 - Summarize the survey into reports as necessary

2. In support of the Director of Membership and/or Director of Marketing

Membership Applications

- Update Membership Directory before each monthly board meeting.
- Provide a monthly report to the Membership Director with membership statistics that include members who are pending deletion, proposed new members and other statistics as directed by the Committee.
- Upon direction of the Membership Director (with Board Approval) add new members to the ISM-KC database.
- Provide a list of direct ISM-International recruits to the Membership Director before the monthly board meeting.
- Upload new Members to the CVENT database and website directory monthly or as necessary.
- On the 1st of each month, prepare the Membership Activity Report and send electronically to the Membership/Marketing Director. The report will include the following:
 - The total number of Active members with employer, membership type (IE: student, lifetime, etc) information and the counts by member type as of the last day of the previous calendar month.
 - A summary of all activity accounting for changes since the previous month, including the names of any non-renewed members (may be separate attachment, depending on number).
 - A list of all new applicants.

3. In support of the Program/Education Directors – Education Events

- Create and send CVENT invitation to membership for Education / Program events
- Update website event posting with link to CVENT invitation registration form
- Prepare events as directed by Program/Education Directors on CVENT

- Output CVENT reports to include full name, employer, membership status, and payment status.
- Process all manual credit card registrations and send receipts as necessary.
- Reporting to the Program/Education Directors.
 - Send event registration form (head count) to the Program/Education Directors or other responsible ISM-KC Members before the event.
- Create documentation certificate for Continuing Education Hours (CEH) for all Members attending the Program/Education event.
- Summarize the event and archive the records.

4. In support of the Treasurer

- Prepare Treasurer's report to be mailed on the 15th and last day of each month. Report includes:
 - Checks received
 - Credit cards processed
 - CVENT payments received
 - Invoices received
 - Report must document the income with detailed descriptions (i.e. CPSM or C.P.M.)
- Recording Income – Checks and Credit Card Charges
 - Post the checks to the Treasurer's Report for the appropriate time period.
 - Post manual credit card charges, CVENT charges and those charges processed through the Nova/Encompass terminal, and record the date, amount, approval number, and record number on the appropriate event registration or invoice document.
 - For non-CVENT registrations, email a receipt to the participant and manually enter registrations and payment (if CC) into CVENT
- Assist with bank statement reconciliation as necessary

5. In support of the Director of Education - Certification

- Prepare events on CVENT for Seminars, Satellite Seminars and CPSM/C.P.M. review sessions or any other events as requested by Education Director.
 - Output CVENT reports to include full name, employer, membership status, and payment status.
 - Process all manual credit card (only if CVENT cannot be utilized) registrations and send receipts as necessary.

- Create documentation certificate for CEH for all Members attending the event.
- Send event registration form (head count) to the Program/Education Directors or other responsible ISM-KC Members before the event.
- CPSM/C.P.M Review Sessions:
 - Order study guides and distribute to the CPSM/C.P.M. participants two weeks prior to the review sessions

6. In support of the Director of Communications

- Send Newsletter deadline reminder to the Board monthly per the published dates
- Prepare the monthly newsletter with materials as submitted by the Communications Director
- Post the newsletter in Adobe Acrobat format on the website
- Prepare email blast on CVENT to notify membership that the newsletter is available on the website - Monthly.

7. Maintain miscellaneous electronic and hard copy archives

- Attendance records, reservation forms, proof of payment for seminars, CPSM/C.P.M study & review sessions, and monthly dinner meetings.
- Membership applications and proof of renewal payments.

8. Other Duties

- Support the ISM-KC Board of Directors with other reasonable tasks that may not be identified on this statement of work.