



ASSOCIATION  
MANAGEMENT  
CONSULTANTS, LLC

Job Title: Account Manager I

### **Essential Job Functions**

Collaborate and assist on your specified association accounts with a Senior Account Manager (SAM). Must attend all “team meetings” for your specific association conducted by the Senior Account Manager.

### **Association Educational Programs:**

- Ensures that required components of education programs meet the accreditation standards and corresponds to the continuing education mission of the organization
- Ensures quality control and consistency of continuing education documentation for all CE activities
- Assists with preparation of accreditation applications and documentation
- Oversees the facilitation and implementation of CE credit verification process
- Assists with preparation of education activity brochures and course materials.
- Generates committee correspondence and minutes and respond to inquiries as requested
- Assists with the development of a continuing education policies and procedures manual
- Prepares reports on activities as needed per direction of SAM.
- Attends committee meetings and any other planning meetings on an as needed basis.

### **Association Membership:**

- Downloads chapter reports from National/Global Associations
- Sends e-mails to new members within 24 hours of receiving e-mail, if applicable
- Assists with Recruitment & Retention Programs
- Assist with membership promotion and retention programs, evaluates results and recommends policies, procedures and actions to achieve membership goals per direction of SAM.
- Collects dues and terminates delinquent members.
- Perform membership uploads
- Update and/or create membership directories
- Respond to all inquiries
- Assist SAM with membership reports.

### **Association Accounting:**

Accounting is inclusive of budgets, reviewing reports, coding deposits and checks in collaboration with SAM.

- Invoices for unpaid registrations (initial invoice and one follow-up statement)
- Receives and reconciles all credit card charges, collected for or at meetings, programs or events, for advertising, network registrations, etc.
- Assist in providing the treasurer with monthly financial reports detailing funds deposited by functional activity
- Assist in production of accounting reports and monthly financials
- Manages long/short-term investments w/Treasurer
- Assists auditor as needed per direction of SAM
- Assists Treasurer as needed per direction of SAM
- Help to ensure that all funds, physical assets, and other property of the association are appropriately administered and safeguarded.

#### **Association Governance/Board Management:**

- Attend Board retreats, meetings, and committee meetings as needed.
- Prepare and distribute ballot to membership per direction of SAM
- Updates policies, procedures and programming documents per direction of SAM.
- Market research and analysis per direction of SAM
- Attends chapter board meetings and prepare minutes (chapter secretary must have oversight)
- Assists SAM in carrying out the Society's mission
- Assists President & President-Elect as requested per direction of SAM
- Help monitor and enforces the Society's policies and procedures
- Assist with preparation of management reports for the Board per direction of SAM
- Assemble board packets when applicable

#### **Association Events:**

##### **Programs:**

- Per direction of SAM confirm speaker and AV needs
- Assist with marketing materials and email communications, ordering certificates and awards.
- Assist with program analytics.
- Coordinates all registrations for chapter events
- Prepares name badges for all attendees for chapter events
- Set-up and tear down of registration table
- Works with speakers and venues for chapter events

#### **Association Marketing:**

**Website Updates:** As needed, urgent projects and redesigns, review proofs and approvals

- Sends out blast e-mails to members and potential attendees for programs per approval from SAM
- Compiles chapter newsletter per approval from SAM
- Updates chapter website per approval from SAM

#### **Association:**

- Assist in creation of weekly email communication piece to all members highlighting upcoming events and current information
- Prepares program announcements when provided with information from program committee and arrange e-mail announcements from SAM
- Assist in oversight of association branding

**Overall Association Management:**

- Handles chapter mail
- Files and stores chapter records, archives and other items
- Provides courteous and timely response to all telephone calls, written and electronic communications
- Either answer or re-direct all inquiries, faxes, correspondence and messages to SAM as appropriate.
- Maintains official minutes of Board of Directors and other official meetings of the organization, provides security for all files, legal and historic documents, membership and mailing lists.

**Association Sponsorship:**

- Once sponsors are known, invoice them and update the website (Chapter) when payments come in.