

Association Operating Processes and Procedures

Chapter 1: Administrative Services Structure

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1.2.1 *Executive Director*

1.2.2 *Administrative Supervisor*

1.2.3 *Manager, Professional Development & External Relations*

1.2.4 *Manager, Marketing, Communications & Technology*

1.2.5 *Administrative Assistant*

1.2.6 *Consultants & Contracted Services*

1.3 Functional Divisions of the Association

1.3.1 *Board of Directors*

1.3.2 *Commissions, Standing Committees and Sub-Groups*

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2.1.2 *Fair Employment Policy*

2.1.3 *Employee Compensation Policy*

2.1.4 *Policy for Approved Rates of Compensation*

2.1.5 *Contracted and Outsourced Services Policy*

2.2 Employee Guidelines and Processes

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2.2.2 *Reliable Attendance*

2.2.3 *Paid Leave Policy*

2.2.4 *Compensation and Benefits*

2.3 Exempt/Non-Exempt Employees

2.3.1 *Definitions*

2.3.2 *Time Card Processes*

2.3.3 Non-Exempt Overtime Guidelines

2.4 Employee Evaluation Process

2.4.1 Probationary Period, Evaluation and Performance Reviews

2.4.2 Training and Professional Development

2.4.3 Cross Training of Staff

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2.5.1 General Reimbursement

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3.3.1 Four Strategic Planning Areas

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3.4 Ongoing Work to Address Goals [Current Strategic Plan]

3.5 Related Workgroups, Responsible Staff and Consultants

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- 4.1.2 Reserve Fund Definition and Process*
- 4.1.3 Reserve Fund Target, Management and Authority to Expend*
- 4.1.4 Budget Development and Reporting Calendar*

4.2 Financial Operations, Processes and Guidelines

- 4.2.1 Chart of Accounts*
- 4.2.2 Funds and Accounts*
- 4.2.3 Resources/Accounts Receivable (AR)*
- 4.2.4 Processing Receivables*
- 4.2.5 Expenses/Accounts Payable (AP)*
- 4.2.6 Processing Payables*

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5.1 Marketing Plan

- 5.1.1 Process and Timeline for Plan Development*
- 5.1.2 Assessing the Brand*
- 5.1.3 Membership Marketing/Communications Plan*
- 5.1.4 Programs & Event Marketing/Communications Plan*

5.2 Communication Plan

- 5.2.1 Process and Timeline for Plan Development*
- 5.2.2 Maintaining the Editorial Calendar*
- 5.2.3 Internal/External Communications Templates*

5.3 Communicating with Members, Potential Members, Stakeholders

- 5.3.1 Publications:*
 - ACCCA Reports Newsletter*
 - Weekly Legislative Update*
- 5.3.2 Online Presence:*
 - ACCCA Website*
 - Event Marketing & Online Registration*
 - Advertising*
 - JobTrac Marketing & Subscription Service*
 - Online Publication Sales*

- 5.3.3 *ACCCA Social Media Outlets*
- 5.3.4 *Written [hard copy] Communications Templates/Guidelines*
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- 5.4.1 *Annual Survey*
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5.5 Other Publications: Position Papers/White Papers

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- 5.6.1 *Data Gathering Processes/Timeline*
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5.7 Establishing Proprietary Data/Intellectual Property

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- 5.8.1 *Hardware and Equipment Inventory/Status*
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- 6.5.1 Reports and Distribution Plan*
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- 6.7.1 Quarterly Outreach Reports*
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6.8 Role of the Regional Member Council

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6.10 Development of Recruitment Materials/Online Content

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- 6.11.1 Board Presentations*
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- 7.1.1 Role of the Commission for Finance, Legislation and Advocacy*
- 7.1.2 Role of the Contract Lobbyist*

7.2 Advocacy On Behalf of Members

- 7.2.1 Legislation Tracking, Reporting and Advocacy*
- 7.2.2 State Budget Advocacy*
- 7.2.3 Coalition Building on Issues Important to Members*

7.3 Advocacy Communications

- 7.3.1 Incoming Communications*
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 - From Legislators and Coalitions*
- 7.3.2 Outgoing Communications*
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*Annual Budget Position Paper
Topic Specific Communications*

7.4 ACCCA PAC Management

- 7.4.1 PAC Charter/By-Laws*
- 7.4.2 PAC Fund Management*
- 7.4.3 Policy for Contributing Funds*
- 7.4.4 Reporting Requirements/FPPC*
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- 8.1.1 Role of the Management Development Commission*
- 8.1.2 Role of the Contracted Meeting Planner*
- 8.1.3 Role of Manager of Professional Development & External Relations*

8.2 New [Emerging] Program Design and Delivery Process

- 8.2.1 Determining Program Need [Data Collection]*
- 8.2.2 Developing Program Format, Structure and Content*
- 8.2.3 Establishing the Program Budget*
- 8.2.4 Site Research and Selection Process*
- 8.2.5 Program Marketing and Promotion*
- 8.2.6 Post Program Debriefing and Evaluation*
- 8.2.7 Determining the Value of the Program*

8.3 Ongoing Program Management Processes

- 8.3.1 Existing Program Descriptions:*
 - 8.3.1.1 Mentor Program*
 - 8.3.1.2 Admin 101*
 - 8.3.1.3 Admin 201*
 - 8.3.1.4 Annual Conference*
 - 8.3.1.5 Annual Budget Workshop*
- 8.3.2 Annual Content Review, Assessment and Development*
 - 8.3.2.1 Call for Proposals*
- 8.3.3 Participant Selection Criteria and Vetting Applicants*

- 8.3.4 Participant Notification and Program Communications*
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- 8.3.6 Program Certificates and Participation Documentation*
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 - 8.4.1.1 Meeting Set Up Protocol*
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 - 8.4.1.3 Regional Events Guidelines*
- 8.4.2 Essential planning documents:*
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 - 8.4.2.2 Timeline/Responsibility Grid*
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 - 8.4.2.4 Marketing Template & Online Forms*
 - 8.4.2.5 Sponsorship or Affiliation*
- 8.4.3 Establishing the event/program budget and registration process*
 - 8.4.3.1 Budget Template*
 - 8.4.3.2 Post-Event Financial Report Template*
 - 8.4.3.3 Online registration/processing*
 - 8.4.3.4 Cancellation Policy/Refunds*
- 8.4.4 Policies/Processes for the Annual Recognition (Awards)*
- 8.4.5 ACCCA Recognition [Award] Program Categories*
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 - 8.4.6.2 Advance Communications and Timeline*
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- 8.4.7 Policy/Process for recruiting sponsors/exhibitors*
 - 8.4.7.1 Development of the annual sponsorship menu/price list*
 - 8.4.7.2 Sponsor Communications & Guidelines*
 - 8.4.7.3 Processing Sponsor/exhibitor requests*

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8.5.2 Contract requirements and deadlines

8.5.3 Payment of deposits and advance amounts

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8.5.9 Power Point and Other On-Site Media & Technology

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8.5.11 Post-event record keeping