

# STRATEGIC PLAN JULY 2014 TO JUNE 2019

## Mission, Purpose, and Values

*"ACCCA is committed to developing and supporting community college leaders through unparalleled advocacy, professional development and networking opportunities."*

## MAJOR SERVICE AREAS OF THE ASSOCIATION GOALS/OBJECTIVES AND RELATED NECESSARY SUPPORT SERVICES

Having successfully completed the fourth and final phase of the Association's Initial Strategic Plan (2010-2014), the original structure approved by the Board in 2010 is now up for review and consideration. Previously, the Board chose to focus the plan on a four year transition from a consultant-centric operation to one of in-house employees performing the majority of the work assisted by consultants in selected areas.

As we move forward, adjustments need to be made to the existing Plan to refocus the attention away from the structure and toward progress for our members. Although the prior plan was paired with an annual goal setting exercise to develop steps toward progress in our five service areas, future strategic planning should integrate these goals and objectives into the annual work plan and allow for more concise and regular reporting to members, as well as actively tracking progress to identify areas where resources may be misaligned or more volunteer assistance is needed to complete.

For 2014-15, while professional development and affiliate management services will continue to be the leading hands-on activity, we find ourselves at the apex of opportunity with regard to our legislative advocacy on behalf of members. Attention on this service area will become more defined and grow in 2014-15, and the Association will need to align resources to continue this trend and leverage opportunities. We will continue to devote resources toward strengthening relationships with our affiliate organizations because we know that path will inform our legislative agenda and professional development programs just as it increases our visibility at the state level.

As evidenced by the member survey results (consult your summary), the membership as a whole is now younger and has been in the system and in ACCCA for a shorter period of time. Unlike the generation before them who are now retiring in droves, these members are less committed to an Association simply because they've always known it, and we will therefore need to find ways to better communicate with members as we continuously justify our existence to them. Consider our members as the *"what have you done for me lately"* generation, and they're the administrators that now constitute the largest portion of our membership.

Another factor to consider as we go forward, over the last several years there was an increasing need to adjust the membership dues structure, both in its complexity and to better reflect the real cost of the myriad of services and benefits that have improved since the last dues adjustment in 2007. Prior to that time, the only other significant adjustment to the dues schedule since the organization was formed thirty-five years ago was in 1998 when the original flat dues rate was converted to variable rates based on administrative salary ranges at the time. So, in the past 15 years, dues had only been increased twice, both by modest increments.

One year ago, the ACCCA Board rectified that trend by instituting both a simplification of the dues structure (compressing 27 separate payroll bands into 12) and essentially "rounding up" for a much needed increase overall. The implementation of that adjustment is just now wrapping up and we're already seeing an improvement in the bottom line with annual dues revenue in 2014 outpacing 2013 by over \$30,000 and showing comparatively little attrition as a result.

But the old adage rings true: *Just when you figure out where it's at, it moves!* On June 5th, we were notified by our long time benefit carrier ACSA/SASS that they're no longer going to be affiliated with California Casualty for the \$1 million in professional liability coverage our members have enjoyed since 1998 (*it was a \$150,000 benefit when it began in 1986*), and unless they can find another insurer, this benefit is essentially going away as of August 1st. They've know this for 15 months, but we're just now being informed.

The reality is that we may now have to address the loss of this primary benefit with our members in the context of a recent dues increase. To avoid this from happening, we're working with ACSA as well as an array of other carriers to resolve the issue so that our members are not left uncovered. We believe this will eventually happen, however, at the same time our marketing needs to be geared toward justifying what we cost our members in dues, as measured by the value of what they get from us in return.

# STRATEGIC PLAN DISCUSSION POINTS BY SERVICE AREA

Going forward, as we strategically plan for the future, it is the recommendation of the Executive Committee that ACCCA continue to operate within the five established service areas listed below. Our discussion this week will focus on each of those areas in the context of policies and challenges that now face our colleagues and the California community colleges as we develop the next five year plan.

- **Member Benefits and Services**
- **Advocacy Services**
- **Professional Development Programs and Services**
- **Communication and Information Services**
- **Operational & Management Services**

## Member Benefits and Services

This area incorporates the process of recruitment and retention of members, the review of existing benefits, and improving overall member satisfaction. This service area also encompasses oversight of the existing membership database and historical member records, as well as outreach activities and recruitment.

**Member Benefits & Services Policy Statement: *Regarding ACCCA benefits, services and programs, it is the policy of the ACCCA Board to ensure the Association's resources are utilized, among other things, for:***

1. Continuous recruitment of new members (including education, business and associate members) to further strengthen the administrative coalition in the California community colleges;
2. Maintaining accurate member records and reporting statistics regularly. Providing current information on membership benefits, services and programs as requested;
3. Establishing and keeping current a value-based dues schedule for members and business partners;
4. Maintaining, energizing and engaging a network of Campus Reps on every campus in California to the advantage of the administrative coalition;
5. Maintaining existing benefits and exploring the acquisition of new and updated benefit programs and services for members;
6. Annually surveying members and actively considering and following through on their recommendations;
7. Establishing and maintaining productive and mutually beneficial relationships with affiliated organizations.

## **Status of Goals and Objectives Established in June, 2013**

**Goal:** *Improve Member Benefits and Services in 2013-14*

### **Objectives:**

- *Establish an oversight committee to work with staff to review existing benefits provided by SASS to determine their ongoing viability or adjustment. Provide a recommendation for improvement to the Board. **NOT ACCOMPLISHED—MOVE TO 2014-15 OBJECTIVES.***
- *Direct the Finance Committee to work cooperatively with the subcommittee to review benefits and services and based on their assessment, recommend a plan to align member dues revenue with services and benefits to ensure value to the member and ongoing sustainability to the Association. **ACCOMPLISHED IN 2013-14!***
- *Work through the Exec Committee and CFLA to quantify the successful Affiliate Summit including a description, purpose, format and designated participants toward the goal of establishing it as an annual event which brings together all of the major administrative groups in one forum under ACCCA. **IN PROGRESS- NEEDS FURTHER DEFINITION IN 2014-15.***
- *Working through the CFLA, the Board should propose a recommendation that the PAC consider restructuring to include the voices and support of ACCCA affiliate group representatives and their members. **ATTEMPTED IN FEBRUARY 2014-CONTINUE TO WORK WITH BOARD ON THE RESTRUCTURE OF THE PAC IN 2014-15.***

### ***Support Services Required:***

- Work with Board members to develop a plan to more effectively engage Campus Reps in the recruitment and information distribution process for ACCCA.
- Based on the Board's decision in June 2014, establish a working relationship with a provider to assist in the reformatting of the Member Survey. Schedule the Survey for later in the year so as not to conflict with end of year activities on campuses.
- Distribute Member Survey results and Board assessments to all Commissions for their action on applicable objectives.
- Daily processing of member dues payments; new enrollments, transfers and suspensions;
- Daily updating of pertinent rosters, directories and email lists;
- Daily communications regarding membership benefits, services and programs and processing of requests;
- Monthly and annual analysis of membership change statistics, identification of trends, development of necessary reports and updating pertinent vendors or benefit providers;
- Monthly/daily documentation of member transactions and records;
- Develop and conduct an annual recruitment campaign and establish a presence at state-wide and/or campus events to inform and engage potential members;
- Maintain membership-related information on the Web Site and other venues;
- Prepare and distribute information to the Board and Commissions for their recruitment efforts.

### **Advocacy Services**

This service area incorporates not only the representation of members' interests in the state-wide political process through the volunteer service of appointed representatives (CFLA), but also the ongoing development of positions and messages, information and advocacy material which are deemed reflective members interests.

**Advocacy Services Policy Statement:** *Regarding the monitoring of legislation and the state budget process, as well as state level policy discussions, it is the mission of the CFLA and the policy of the Board to actively pursue the interests of ACCCA members at specified opportunities within the Legislature, state agencies and through our affiliate organizations. Specifically:*

1. Identify issues that either benefit or adversely impact community administrators and their colleges;
2. Respond to issues with official positions, policy concepts, and potential new legislation to address issues;
3. Continuously monitor the state budget process and express viewpoints where appropriate and in the interests of members;
4. Facilitate two-way communication between ACCCA and our members to assess their needs which can be addressed through legislation or the active opposition of existing legislation;
5. Facilitate two-way communication between ACCCA and other organizations regarding common issues;
6. Engage and educate state leaders on the Administrator's perspective;
7. Develop and distribute public statements regarding ACCCA positions on the above including but not limited to testimony, support or oppose communications, position papers and editorials.
8. Establish, maintain and utilize a Political Action Committee on behalf of our members.

## **Status of Goals & Objectives Established in June, 2013**

### **Goal 2: Improve Advocacy Services for Members**

#### **Objectives:**

- *Establish a template agreement for direct advocacy that can be enacted as needed for specific periods of time (month to month). This would only be used when the Board and CFLA determine that a significant policy or legislative issue requires professional services to lobby on behalf of the Association. **COMPLETED AND IN USE IN JANUARY 2014***
- *Create a concise message to communicate the concept of the "affiliate coalition" and formalize representation on the CFLA by representatives of affiliate organizations. **ACCOMPLISHED. THE EXISTING CFLA ROSTER FEATURES THE PERSPECTIVES OF ALL MAJOR ADMINISTRATIVE GROUPS.***
- *Discontinue the annual BOG dinner and instead invest in an annual Legislative Reception to be held in January each year in conjunction with the annual Budget Workshop. Provide training on key issues and*

*talking points for board members prior to the event to maximize effectiveness with legislators. COMPLETED-FIRST EVENT IN JANUARY 2014.*

- *Establish a regular breakout session or workshop on advocacy and legislative issues to be held at each annual conference to inform members and promote the PAC. COMPLETED-TWO LEGISLATIVE RELATED SESSIONS WERE HELD IN FEBRUARY 2014.*
- *Develop a focused campaign to increase funding to the PAC along with the planned review of the dues schedule. Review the “opt-out” assessment for the PAC and tie all fundraising efforts to current issues and policy. Ensure that each event registration includes an opportunity to contribute to the PAC and some form of recognition of PAC contributors at all ACCCA events. IN PROGRESS-ESTIMATED COMPLETION IN 2014-15 IN CONJUNCTION WITH NEW STRUCTURE.*

#### **Support Service Requirements for Advocacy Services:**

- Work with CFLA and PAC chairs to develop calendar of meetings, events and publications related to advocacy and PAC activities;
- Work with CFLA and PAC chairs to develop & distribute agendas for regular meetings;
- Monitor Legislature’s “Daily File” and confer with consultants for information on legislation and distribute or respond accordingly;
- Produce support/oppose letters and reports and bulletins on request and under the direction of the CFLA;
- File semi-annual FPPC reports & required documentation pursuant to the laws of the State of California;
- Provide regular updated information for publication on the Association's web site, newsletter
- Issue advice bulletins & alerts as necessary and/or indicated by the CFLA;
- Work with volunteers and consultants to prepare regular reports for PAC/CFLA and Board meetings;
- On request, coordinate and provide testimony and/or present at legislative hearings and affiliate events;
- Organize and conduct regular events to network with state policy and legislative leaders.

### **Professional Development Programs & Services**

This service area incorporates the design and facilitation of cutting edge professional development programs to support and nurture a workforce of administrators who are tasked with writing the next chapter of community college administration in California.

**Professional Development Programs & Services Policy Statement: *It is the policy of the Board and the mission of the Management Development Commission to design, provide and evaluate an ongoing program of professional development specifically tailored to the needs of the California community college administrator toward the goal of providing an established path to excellence and leadership for members of the Association. It is the intent of the Board that this service will incorporate the following components:***

1. Provide for the design, facilitation and maintenance of innovative professional development programs for members which are either funded by the Association, are self funded and/or revenue generating;
2. Establish and maintain a process for the continuous evaluation of existing programs;
3. Research, solicit and develop innovative content that is current and effective, and utilizes, demonstrates and promotes emerging technologies;
4. Research and select the best speakers and facilitators who are appropriate for the event;
5. Engage volunteers to assist in planning and production of effective programs to aid them in their own development as leaders;
6. Liaison with ACCCA commissions, affiliates and the campus rep network to engage them in the learning process and effectively publicize and report on programming to members;
7. Recruit the support of business partners to promote their interests and support learning programs;
8. Design and maintain a streamlined event registration process and provide effective communications with participants;
9. Provide access to program materials in the most efficient and effective format available;
10. Provide for a member recognition and recruitment element at each event
11. Offer assistance and advice to Affiliate Organizations in their effort to provide professional development for their members and use these opportunities to increase awareness about ACCCA and recruit new members.

## Status of Goals/Objectives Established in June, 2013

### Goal: Enhance Professional Development Opportunities for Members:

#### Objectives:

- The MDC and Board working together with the Accrediting Commission will develop a process to assist and guide presenters in the development of content that results in trained administrators who want to meet and exceed the standards for accreditation in the State of California. As new content is developed and brought on line, a review process should be instituted that ensures all content is run through a filter of accreditation standards and information provided models accepted best practices of the system. **ONGOING- ASSISTED ACBO WITH WORKSHOP IN SEPTEMBER AND MDC TO ADDRESS PROCESS FOR CONTENT REVIEW IN 2014.**
- Address the need of affiliate organization ACHRO to provide enhanced leadership training through an institute designed by them and facilitated by ACCCA in the 2013-14 year. **ACCOMPLISHED!! ACHRO LEADERSHIP PROGRAM LAUNCHED IN 2014.**
- Staff will develop an Event Tracking Calendar that would be available to the membership on the website. The Tracking Calendar will assist members in understanding the programs that are available to them from all organizations including the focus of the program, cost and deadlines for application. **COMPLETE- PRESENTED TO CCLC LEADERSHIP ROUNDTABLE IN NOVEMBER. ONGOING UPDATES WILL BE AVAILABLE THROUGH THE ACCCA OFFICE.**
- Staff will develop a budget timeline to help the Board understand the cash flow impacts of various programs and competing events so that ACCCA's menu of training options can be better budgeted and revenue highs and lows can be anticipated. **IN PROGRESS-ANTICIPATE COMPLETION IN 2014-15. RECOMMENDATION GOING TO THE BOARD IN JUNE.**
- Staff will establish an historical event database to track the statistics of each event in order to show program growth or decline, outcomes and comparative data with other programs. **IN PROGRESS-ANTICIPATE COMPLETION IN 2014-15.**
- The MDC working with the Board's Finance Committee will develop a structure for an ongoing Professional Development Scholarship Fund for Administrators to be funded through donations of members and business members. The Scholarship Fund would cover the extraordinary costs (fees and travel expenses) for administrators who are not funded by their district and cannot participate otherwise. **NOT COMPLETE- ONGOING.**

#### Support Service Requirements for Professional Development Services:

- Establish a template for planning and production of events and continue to standardize planning processes which can be adapted to affiliate organization events.
- Work with MDC Chair(s) to schedule meetings, develop and distribute agendas for MDC meetings for the purpose of planning ACCCA professional development programs;
- Work with MDC Chair to develop a calendar of events for each operating year and regularly communicate event information to members using the Associations communications vehicles;
- Work with MDC Chair(s) to develop regular reports to the Board on event planning progress;
- For each event, provide research and site selection, and negotiate contracts for facilities and services related to the event in the best interests of the members or the Affiliate Client;
- For each event, develop a quick reference sheet (QRS) containing data on the location, travel and logistical information for in house and external use;
- Develop a timeline of tasks for each event and indicate who's responsible for each.
- Monitor all staff, consultant & volunteer activities related to each event;
- When appropriate, develop and distribute a "call for proposals" to solicit sessions at events and/or recruit presenters;
- Process all submissions for breakout sessions & facilitate a selection process;
- Develop and distribute a menu of sponsorship options;
- Maintain the Association's web site, Facebook page and other electronic venues with current event information;

- Maintain a database of registrants, options and vendors for each event and update as appropriate; provide reports to MDC and Board as requested;
- Develop action plan for registration, shipping of materials, schedule & assignments of volunteers, staff and consultants;
- Develop shipping inventory of equipment and materials;
- Develop schedule of on-site volunteers for events;
- Research & hire outside services for on-site event support & engage services of temporary personnel including technicians and registration workers;
- Evaluate and summarize communications and final event financial information for each event;
- Provide annual budget projections and updates to the Board regularly for each event in line with established revenue goals;
- Maintain historical data and records of events and activities.

## **Communications and Information Services**

This service area incorporates the cross communication between ACCCA and its members, affiliate organizations and the wider education and political community.

**Communications & Information Services Policy Statement:** *It is the policy of the Board that in establishing and maintaining a strong communication component for ACCCA, priority be given to involving volunteers in the development of content and commentary. Specifically, in the oversight of content for the Association's communication vehicles, and in the development of a member-based message or in the evaluation of the effectiveness of ACCCA's communications efforts, the Association will rely on member-volunteers to:*

1. Advise staff on the maintenance and expansion of the Association's existing web site, Face book page and other electronic venues in order to communicate the mission of the Association and keep members informed;
2. Advise staff in the development of messages and targeting key audiences for communications purposes in the interests of members;
3. Advise the staff in the maintenance of the member database as appropriate;
4. Work with staff to establish a marketing plan for the Association to recruit members and promote its mission;
5. Work with staff to establish an annual publications calendar designed to address issues important to members;
6. Work with staff to establish annual revenue goals with regard to advertising and publication sales;
7. Develop strong, compelling member-based content for a bi-monthly newsletter;
8. Work with staff and the MDC to develop effective publicity strategies for ACCCA events, services and benefits;
9. Advise staff on format and content for the annual survey of members to gain information on demographics as well as member needs;
10. Advise staff on format for an annual benchmark compensation survey;
11. Advise staff on the maintenance of a repository of historical data and photos and provide an inventory accessible to members and others;

**Goal:** **Improve Communications and Information Services to Members**

### **Objectives:**

- *Work with staff to explore a definitive menu of advertising options for business members and other groups and agencies and develop a corresponding rate structure that provides cost effective options for advertising to ACCCA members on the web site and through our publications and event programs. **COMPLETED IN 2013-14.***
- *Work with the state-wide Membership Coordinator to review and update all existing publications designed for member recruitment. **COMPLETED IN 2013-14.***
- *Review all online form templates and work with service provider to improve them. **COMPLETED IN 2014-15.***
- *Work with the Executive Director to research contract terms and negotiate the agreement for a consultant supported annual salary survey including suggestions for improving the survey. **IN PROGRESS-ANTICIPATE DECISION BY THE BOARD ON STAFF RECOMMENDATION, JUNE 2014.***

- Move to six bi-monthly issues of the newsletter and establish a greater presence for Affiliate Groups within the context of the newsletter. **COMPLETED 2013-14.**
- Develop an updated Business Member Benefits and Cost Alignment Plan to increase interest in ACCCA by potential new Business Members and better retention of existing Business Members. This was a new goal added in January 2014. **IN PROGRESS-ANTICIPATE COMPLETION IN 2014-15.**

#### **Support Service Requirements for Communication & Information Services:**

- Work with the COC to establish a mission, roster, goals & objectives, and a budget for the work of the commission;
- Work with COC chair to schedule meetings, develop agendas and prepare reports to the Board;
- Establish and maintain all avenues for electronic and print communications;
- Work with the Editorial Board to establish an annual publications calendar;
- Work with COC and communications coordinator to develop realistic revenue goals based on advertising and publications sales for the following year;
- Work with design consultant for logo creation, program layout, graphic design;
- Create custom graphics for use on ACCCA website and Facebook page;
- Create custom graphics for promotional materials;
- Create program materials for professional development (both online and printed materials);
- Design and distribute solicitations for advertising and job postings to corporate partners and colleges;
- Process all requests for advertising and job postings including invoicing and monitoring payments;
- Solicit content for the monthly newsletter;
- Liaison with all commissions and the Board to gather information for purposes of informing members;
- Liaison with MDC to publicize all events to members and others;
- Research contract terms for a consultant supported annual salary survey;
- Confer with Board and commissions to update and distribute an annual survey of members;
- Provide analysis of survey results and report to the Board;
- Conduct a daily review of web page content and update as appropriate;
- Conduct email blasts to members for the purpose of information and publicity;
- Conduct an annual review of all forms and recruitment materials to keep current;
- Solicit nominations for ACCCA Awards;
- Work with CFLA to establish legislative and advocacy communications to the members as appropriate;
- Maintain and custom create Association website content and online forms;
- Arrange for print and mail services as indicated for newsletter and other communications vehicles;
- Establish and maintain communications with members of CCPRO to solicit information for inclusion in the newsletter.

### **Operations and Association Management Services**

This service area incorporates the administrative support of the Board and commissions, committees and of the Affiliate Organizations that are in contract with the Association to provide those services. It also encompasses all day to day functions such as financial operations, human resource management and state and federal compliance requirements for non-profit associations and in accordance with the Association's policies and procedures, constitution and by-laws.

**Operations & Association Management Services Policy Statement: *It is the policy of the Association to direct a significant portion of the Association's resources, both financial and human, toward the legal, ethical and efficient operation of ACCCA, a 501 C 6 non-profit Association, and to ensure this through rigorous review and regular reporting to an oversight Board. The Association will apply those same standards to each affiliate organization with which ACCCA contracts to provide management services and these standards shall constitute the framework for:***

1. Keeping current and ensuring the adherence to an established compilation of policies and procedures endorsed by the Board which includes the constitution of the Association; their by-laws and the operating processes that govern ACCCA;

2. Ensuring the legal and ethical day-to-day fiscal operation of the Association including all required Federal and State reporting, and knowledge of and adhering to all laws governing the operation of a 501 C 6 organization within the State of California;
3. Providing financial, personnel management and contract oversight for employees and consultants of the Association;
4. Promoting the mission of the Association to members, potential members, as well as state and national affiliated organizations;
5. Establishing liaisons with ACSA/SASS, CLC and other potential providers to monitor member benefits and influence the acquisition of new benefits in the best interest of the members of ACCCA;
6. Supporting the Board of Directors which oversees the organization and keeping them informed;
7. Supporting the Commissions and committees of ACCCA and their Chairpersons, as well as other volunteers of ACCCA;
8. Providing support, encouragement and on-call assistance to all members of ACCCA;
9. Recruiting new talent to the Association's volunteer leadership;
10. Monitoring trends and explore new opportunities for services, benefits and programs for members and provide advice and counsel to the Board and commissions of the Association on potential new directions;
11. Establishing and maintaining the process by ACCCA contracts to administratively manage and assist other organizations.

**Goal: Review and Streamline Internal Processes**

**Objectives:**

- *Re-establish the Policy & Procedures Committee and develop a meeting schedule for the 2013-14 year with an end date or completion target date. Plan to have a 1st read presentation to the Board in January or February, 2015 with final presentation at the Boards 2015 planning retreat. Limit the committee to 3 members and staff and incorporate transparency into the process by instituting a Policy & Procedures Report at each Board and Exec Committee Meeting. **NOT COMPLETE. MOVE TO 2014-15 GOALS.***

**Support Service Requirements for Operations & Management Services:**

- Provide an annual review of the Association's policies and procedures and update as necessary to ensure that the operation of ACCCA is being carried out according to accepted guidelines;
- Annually establish and distribute an Event Calendar showing meetings, events, and deadlines and incorporating the calendars of ACCCA commissions, committees and affiliate groups;
- Annually establish and update a directory of volunteers and make it available electronically via the web site;
- Negotiate contracts for services on behalf of the Association and make recommendations to the Board for action;
- Monitor activities of all contracted service providers to the Association and report to the Board as necessary;
- Manage staffing and annually evaluate employees of the Association and make recommendations to the Board for necessary actions;
- Receive and process all incoming correspondence, both written and electronic, and respond or distribute as appropriate;
- Receive and route calls and respond to all member requests;
- Process all incoming payments and deposit funds in accord with established procedures as outlined in the Association's policies and procedures;
- Process all invoices and requests for payment using the Association's chart of accounts to code for budgeting purposes, securing checks and appropriate signatures and distribute;
- Provide monthly cash flow reports to the Board;
- Prepare & file all necessary financial reports required by state and federal law;
- Arrange for an annual financial review and audit of internal controls;
- Work with Commission Chairs and the Board to develop an annual budget which establishes annual revenue goals and expense projections;
- Maintain all financial records in accord with accepted accounting procedures for a 501c 6 organization;
- Maintain and monitor the cash accounts of the Association including the general fund; reserve and auxiliary funds and provide regular reports to the finance committee;
- Provide administrative services to the Board of Directions and the Association's commissions and committees and affiliate organizations aligned with ACCCA (ACBO) including arranging for meeting logistics; video conference and conference call arrangements;
- Provide agendas and minutes for all board meetings (ACCCA and ACBO) and maintain an ongoing record of all actions taken;

- Work with the Association's nominating committee to annually establish a ballot of board candidates and distribute the ballot; collect the votes of the members and report election results to the membership;
- Provide for an orientation of new board members; officers and commission chairs and support volunteer leaders of the organization by providing information, advice and materials as appropriate;
- Maintain the historical records of the Association including a chronology of board members and officers; copies of all newsletters and published papers and other significant documents;
- Establish and maintain a filing system of all records including on and off-site storage;
- Maintain an equipment inventory and update with each acquisition and as items are removed or replaced;
- Maintain necessary technology, equipment and consumable supplies including paper; ink etc. and order as necessary (with approval of the director) and within the established budget;
- Negotiate competitive rates for basic services such as telephone service, computer maintenance, electronic data storage, facilities and maintenance and engage as appropriate or maintain ongoing contracts for these services.