

Colorado Springs Executives Association Executive Director Responsibilities

MEMBERSHIP

Recruit New Members

- Create a list of desired business categories that are not competitive with current members and choose 3 of these for the monthly category promotion.
- For each meeting, provide the selected categories to the president. At the beginning of the meeting, the president will announce the three categories selected above. Each month 3 new categories will be added, and the previous month's categories will be dropped.
- Each week, at beginning of meeting the President will ask members to write categories they'd like to see at the top of their lead slip.
- Each week publish the selected categories at the top of the newsletter.
- Maintain a list of members we've lost for possible open categories.
- Create table tents for Wednesday breakfasts promoting the top open categories.

Track Member Attendance

- Record weekly attendance in a spreadsheet. The spreadsheet will calculate attendance, by company, to bill for additional breakfasts. The spreadsheet will also track the number of breakfasts billed for retired and honorary members, who only pay for the breakfasts they attend, billed in arrears.

Contact Delinquent Members

- Coordinate with the board to contact the delinquent members and/or re-send copies of open invoices.
- Attempt to secure a credit card number to keep on file to avoid delinquency.
- Advise the board about unresponsive, delinquent members to determine if membership should be terminated.

Member Retention

- Twice a year, work with the board of directors to call members who didn't attend at least one time in the preceding six month period.
- Promote fresh, interesting programs. Brainstorm at each Board meeting for 10 minutes for programs and events to include the Trade Show.
- Organize member parties – plan a year in advance.
- When a member cancels, ask them why and record the reason they are dropping their membership.

Vetting Prospective Members

- Initial Review - Ask the potential member about the scope of their business. Obtain the prospect's business card and website and review for suitability and potential overlap with existing members. Consider:
 - Scope of business
 - How long in business
 - Testimonials
- If the prospect passes the initial review, provide their contact info and website to any existing members and their sponsors who might feel a conflict and obtain their feedback.
- If no conflict, the prospective member fills out an application and presents it to the Board for review / approval.
- If there is a conflict, bring to the board for discussion. If the board determines that there is a conflict, the prospective member is told that at this time there is not an opening for their category

MEETINGS

Annual Meeting

- Executive Director works with President and Board of Directors to determine topic for annual meeting.
- Executive Director may help create the presentation and President, board member(s) or someone else in the membership may present it.

Nominating Committee Meeting

- Executive Director coordinates selection of Nomination Committee for President.
- Assure the President appoints the nominating committee (one past president; two members from general membership and two current board members) at least one month prior to semi-annual dates of election.
- Executive Director calls all nominees from the nominating committee list and secures a slate of eight for the ballot.
- Assure nominees are announced to the membership from podium, by President and in the newsletter by Executive Director. Nominees become greeters for the month leading up to elections.
- Executive Director announces by press release, each elected board of directors (officers and other elected board members) after elections.
- Executive Director updates master list of both successful and unsuccessful board members.

Monthly Board Meetings

- Assure that a quorum exists for the meeting (five members)

- Prepare and send packet consisting of agenda, prior meeting minutes, financials, receivables, membership applications and any other information necessary for board review prior to meeting.
- Project board packet at the board meeting and assist President in running the meeting
- Address legal matters, if needed
- Provide board results to members thru newsletter
- Bylaws – assure compliance with and refer to when needed
- Encourage members to serve on the board

Weekly Meetings

- Prepare schedule of greeters and speakers for upcoming meetings
- Encourage members to present at least every two years.
- Assist with AV and any other special needs. AV needs to be ordered one week in advance of each program.
- Connect with members who haven't presented and encourage them to do so.
- Type lead slips into weekly newsletter
- Publish and distribute the newsletter to include upcoming week's presentation, attendance, leads, referrals etc., emailing it to membership every Wednesday night. Also uploads newsletter to website.
- Organize off site meetings as needed

FINANCIAL

- Accounting oversight to include invoicing, collecting and depositing member dues, meals and other expenses, paying bills in a timely manner and bank account reconciliation.
- Create fiscal year budget based on past year to include possible increase in price increase on dues/breakfasts to members. Presented at May board meeting allowing for 30 day notice to membership, if there are changes, per bylaws.
- Organize tax return with CPA annually
- Arrange for bank account signature card for President and Treasurer as needed
- Change signers on bank account every six months.
- Use corporate credit card to pay for all invoices, if allowed by vendor. Presently (2019) Execs is accumulating points for hotel stays to any Wyndham, based on charges to Antlers Wyndham. Membership is awarded a night's stay at any Wyndham when they sponsor a new member.

OTHER

- Mail pick up
- Organize special events – golf tournament, Christmas party etc.
- Represent Execs in and around the community.
- Website updates to include membership directory with current contact information
- Post financials (Profit and Loss Fiscal year to date and Balance sheet) to members only section of website.
- Annually negotiate menu and rates for breakfasts and AV.
- Graphic design of invitations
- Maintain all records and file integrity for Association.
- Send handwritten, personalized birthday cards to all members.
- Send out personal birthday cards to each member.
- Submit new board of directors to Gazette every six months for Movers and Shakers column.