

Roles and Responsibilities - Management Team and Board



PRESIDENT

Weekly

Prepare weekly Agenda & print	Update weekly biz stats, speaker roster, Education presenter, member events, maintain member profiles, copy cumulative Finished Biz graph to Agenda
Conduct Weekly Meetings	Meeting Chair
Co-authorise bill payments with Secretary	Westpac online banking
Review BBG emails and respond to queries	Gmail account

Monthly

Monthly Management Meetings	Strategy meeting for Management Team and Member Board
-----------------------------	---

Annual

Reset Eventbrite weekly bookings link	Eventbrite standard weekly meeting event
Conduct AGM	Presentation, Agend items, New Business arising

Other

Coordinate Visitor Days	Assist with coordinating Visitor Days
Prepare online surveys as required	Survey Monkey

Roles and Responsibilities - Management Team and Board



VICE PRESIDENT

Weekly

Weekly Meetings	Support President in weekly meetings
Collect "What's New" slips	Collate and disseminate slips during meeting, photograph Referral slips, report in Finished Biz total
Referral Checks and Approvals	If required for new membership applicants

Monthly

Monthly Management Meetings	Strategy meeting for Management Team and Member Board
Maintain Member Register & Membership Renewals	Ensure Member Register is up-to-date with member details, review upcoming renewals
Email Member Renewals & issue Tax Invoice	Template setup on MailChimp, tax invoice via MYOB prepared by Treasurer
Follow-up Member Renewals	Maintain Member Register and track Membership Renewal Form completion & annual payment

Annual

Coordinate Visitor Days	Assist with coordinating Visitor Days
-------------------------	---------------------------------------

Roles and Responsibilities - Management Team and Board



SECRETARY

Weekly

Weekly Meetings	Support President in weekly meetings
Coordinate Greengate venue requirements	Collate and disseminate slips during meeting, photograph Referral slips, report in Finished Biz total
Receipt Greengate bills and pay	Westpac online banking, email to President, President to co-authorise
Receipt member disbursements and pay	Westpac online banking, email to President, President to co-authorise
Prepare weekly email to members regarding meeting	Collate visitor information, speaker roster and education presenter roster and email all members prior to weekly meeting
Recording meeting attendance (PALMS)	Printing out and completing attendance form

Monthly

Monthly Management Meetings	Strategy meeting for Management Team and Member Board
-----------------------------	---

Annual

Review and update Constitution	
Review and update By-laws (Policies)	
Prepare AGM Agenda and Minutes for action	
Coordinate Visitor Days	Assist with coordinating Visitor Days
Review and reinstate insurances	Association insurances renewal AON

Roles and Responsibilities - Management Team and Board



TREASURER

Weekly

Reconcile MYOB payments/receipts & input Greengate bills	Bookkeeping function, bank feeds reconciliations and matching
--	---

Maintain Payments folder	Copy bills and receipts to folder and record payment dates
--------------------------	--

Input Performance Report data	PALMS (attendance), Referrals, Finished Biz, Biz-2-Biz
-------------------------------	--

Monthly

Prepare Performance Report & presentation	Powerpoint based on quarterly Performance Report results
---	--

Issue monthly breakfast fees (full time and associates)	MYOB
---	------

Maintain MYOB data as required	Maintain Contacts and Suppliers, complete reconciliations and prepare profit and Loss and Balance Sheet position for Management Team review and monthly Performance Report to members
--------------------------------	---

Monthly Management Meetings	Strategy meeting for Management Team and Member Board
-----------------------------	---

Quarterly

Prepare Performance Report & presentation	Powerpoint based on quarterly Performance Report results
---	--

Annual

Review and attend to domain name renewal
--
