

### Association Management

*The listed service standards on the following pages reflect the minimum standard that TAS staff will achieve based on normal day-to-day activity. The standards are set to take into account the fact that TAS staff do work on multiple clients and whilst every effort is made to respond as swiftly as possible to requests clients need to be aware of these minimum standards in order to manage their own expectations. If clients require standard services to be supplied within shorter time periods then these need to be agreed in advance and should be amended within this schedule when the service contract is signed. TAS staff will do their best to accommodate special requests within the standard times but will notify clients if this cannot be achieved. We would also recommend that any special requests are communicated vocally rather than relying on email traffic to ensure maximum likelihood of immediate action.*

### Communication

Service	Agreed Level of Service
<p>Responding to or re-direction of enquiries/correspondence via phone and or email.</p> <p><b>NOTE</b> <i>At times, when staff are traveling or out of the office, support staff will be asked to manage the client inbox and adhere to the response time of 24 hours. In periods where this may be difficult, an auto reply will be placed on the inbox specifying a response time of 48 hours. An emergency contact number will be provided for "urgent" queries.</i></p> <p>Postage Mail</p>	<p><b>Phone:</b> TAS phones to be answered within 5 rings or diverted to voicemail. 24-hour response time on voice or recorded messages.</p> <p>If the relevant staff member is unable to return the call on that day, another staff member will try to assist and or advise that the call will be returned within 24 hours. If TAS does not have the appropriate response within 24 hours, enquiry to be directed to the appropriate Association representative.</p> <p><b>Email:</b> All emails are to be acknowledged within 24 hours of receipt. If a specific action to the email is required that will take longer than 24 hours to address, this will be communicated in the response to sender</p> <p>An email notification to the association main contact is to be sent no later than 2 days after receipt of mail received on behalf of the association notifying the contents / action or copying the correspondence.</p>

### Membership Management

Service	Agreed Level of Service
Maintenance of complete and accurate membership records	<p>Annually with member renewal notices members will be asked to update / amend details currently held by the secretariat</p> <p>Email bounce-backs to be called within 30 days to check currency of member information and update accordingly</p> <p>Return to sender correspondence to be followed up within 5 working days to check currency of information and update database accordingly</p> <p>General notifications of amendments to database from members to be actioned within 30 working days and updated accordingly</p>

<p>Management of the membership renewal process (subject to Board confirmations):</p> <ul style="list-style-type: none"> <li>- Production and distribution of notices</li> <li>- Production and distribution of reminder notices</li> <li>- Production and distribution of tax invoices</li> </ul>	<ul style="list-style-type: none"> <li>- 6 weeks prior to end of membership year – first notice via email</li> <li>- 2 weeks prior to end of membership year – reminder via email</li> <li>- Reminder 2 – 2 weeks after the end of membership year – via email</li> <li>- Reminder 3 – 6 weeks after the end of membership year – via SMS</li> <li>- Reminder 4 (at Board direction) – post 6 weeks: discussion with client whether phone (by TAS or client) and/or mail follow-up</li> <li>- Invoices are generated for a new membership year by batch action and sent in line with time frames for distribution of renewals notices</li> </ul>
New member applications	<ul style="list-style-type: none"> <li>- To be processed within 5 days of receipt</li> </ul>
Membership reports including lists of un financial members for Board	<ul style="list-style-type: none"> <li>- 2 weeks post end of membership year</li> <li>- 6 weeks post end of membership year</li> <li>- in conjunction with a monthly report to the board</li> </ul>

## Financial Management

Service	Agreed Level of Service
Processing of supplier invoices	<p>Invoices to be batched fortnightly and sent to treasurer for approval</p> <p>Upon approval invoices to be included within fortnightly payment run in accordance with supplier payment terms</p>
Trade debtor collection (excluding memberships)	<p>Invoices to be raised and sent to customers within 5 working days of notification by TAS staff</p> <p>Reminder invoice to be sent 30 days after initial invoice date to follow up non-payment</p> <p>Phone call follow up to be made after 60 days of non-payment</p> <p>Monthly listing to be included in monthly Board reports of all invoices outstanding for more than 60 days</p>
<p>Production and distribution of the following financial reports monthly:</p> <ul style="list-style-type: none"> <li>- Monthly Management Accounts (including Balance Sheet, Profit &amp; Loss Account and key account reconciliations)</li> </ul>	To be produced within 15 working days of month end
- Annual Financial Statements and Reports	If contracted a set of financial statements will be produced within 45 working days of the year-end to audit quality

## Board / Committee Meeting Administration

Service	Agreed Level of Service
Meeting date reminder and call for agenda items	No later than 3 weeks prior to meeting date
Preparation and distribution of agenda and associated documents	No later than 3 days prior to meeting date
Production of draft minutes	No later than 5 days post meeting to be provided to meeting chair for approval
Distribution and filing of minutes post meeting(s)	No later than 24 hours post approval by meeting chair

## Marketing & Communication Services

Service	Agreed Level of Service
<b>Website</b> Social media posting / updating calendar of events	No later than 48 hours after receiving posting information
Uploading to the website of newsletters, journal articles, publications and sponsorship details	No later than 3 days after receiving information
<b>Communications</b> Perform mass email blasts to members and subscriber databases as directed by the relevant authoriser	No later than 2 days after receiving information
Review of all printed / web marketing materials such as newsletters	TAS policy is to ensure that all mass membership communications are reviewed by a minimum of two people for typographical accuracy prior to distribution. TAS does not verify the accuracy of the content from an industry specific perspective

## Event Management

Service	Agreed Level of Service
<b>Contracts – Venues and Accommodation – if required by client</b>	As required contracts are to be reviewed by the Director of Operations and or Managing Director prior to client signing.
<b>Online Registration set up*</b>	<p>Online registration page to be created within 3 working days of client approved event details in agreed format and with online payment gateway</p> <p>The registration page to be tested 48 hours prior to launch date by a minimum of 2 TAS staff.</p> <p>The registration page to be sent to at least 1 committee member for review and approval 48-24 hours prior to launch date.</p>
<i>*Please note these standards are based on TAS using their even registration system Currinda. If a different registration system is required standard timeframes may require adjustment</i>	
<b>Registrations</b>	TAS to check registrations daily and follow up incomplete registration applications by email.

	Outstanding payments to be followed up on a weekly basis prior to event by email.
<b>Marketing / Communications</b>  <b>Website</b>  <b>Social Media</b>	<p>Content for communications to be distributed within 48 hours of receipt of material in agreed format</p> <p>Information received by TAS from either the client / sponsor / speaker or exhibitor is to be posted no later than 3 days after receipt of information.</p> <p>Where the implementation of Social Media is required, a specific agreement in writing will be developed and signed outlining clear divisions of roles and responsibilities with respects to the posting of content including relevant time frames</p>
<b>Onsite</b>	If TAS is required to be onsite, ideally 10 working days' notice is required. As a guide 1 staff member shall be allocated per 100 delegates. This shall be assessed on the complexity of the event.