

## Association Management

The listed service standards below 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 via a phone call rather than relying on email traffic to ensure maximum likelihood of immediate action. These service standards are only applicable when the client provides all necessary information in order to complete a task.

***Please note in the instance that a client is exceeding the maximum cap of their contract, TAS will do their best to meet the service standards but due to unallocated resource, delays in meeting these standards may occur.***

### Communication

Service	Agreed Level of Service
Responding to or re-direction of enquiries / correspondence via phone and or email	<p><b>Phone:</b> Phones to be answered during standard business hours (AEST). Voice or recorded messages will be acknowledged within the next business day.</p> <p><b>Email:</b> All emails are to be acknowledged within 1-2 business days of receipt.</p>
Postage Mail	An email notification to the association main contact is to be sent within 2 business days once mail is received on behalf of the association notifying the contents / action or copying the correspondence.

***Important note:*** During peak periods, an auto reply may be placed on the inbox specifying a longer response time.

### 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 Association Manager.</p> <p>Member updates received are processed within 5 business days.</p>

	<p>Return to sender correspondence to be followed up to check accuracy of information and update database accordingly.</p> <p>Regularly review and update of membership records where appropriate. This is subject to change during peak periods.</p>
Management of the membership renewal process (subject to Board confirmations)	<p>The production and distribution of tax invoices, notices and reminder notices will be completed in accordance with the Board approved membership renewal checklist.</p> <p>At the completion of the membership renewal period, TAS will issue the membership renewal summary email within 1 week.</p>
New member applications	<p>To be processed and/or in line with the membership committee/Board meetings and/or in accordance with membership process timeframe to be agreed between TAS and client. The maximum standard processing of new membership applications will occur once weekly.</p>
Membership reports including lists of un financial members for Board	<p>A lapsed membership report is issued annually with the membership renewal summary email.</p> <p>A regular membership report will be issued in line with the membership process agreed upon between TAS/Client. The maximum standard membership report delivery set to monthly.</p>

## Financial Management

Service	Agreed Level of Service
Processing of supplier invoices	<p>Invoices to be batched and scheduled as agreed with client (fortnightly or monthly) and sent to treasurer for approval.</p> <p>Upon approval, invoices to be included within fortnightly or monthly payment run.</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>Automated reminder invoices scheduled (standard timeframes – 14, 30 and 45 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>Listing to be included in monthly financial reports of all invoices outstanding for more than 60 days.</p>

<p>Production and distribution of the following financial reports monthly, including:</p> <ul style="list-style-type: none"> <li>• Monthly Management Accounts</li> <li>• Balance Sheet Profit &amp; Loss Account</li> <li>• Key Account Reconciliations</li> </ul>	<p>To be produced within 30 days of the contractual reporting period (month end or as per agreement with the client).</p>
BAS lodgements	<p>Quarterly BAS lodgement completed in line with the ATO's due date.</p>
Financial budgets	<p>If included in client contract TAS will endeavour to provide a draft budget to the Board a minimum of two months prior to the start of the financial year in question. This will be dependent upon TAS receiving from the client all necessary information requested to complete the task.</p>

#### Board / Committee Meeting Administration

Service	Agreed Level of Service
Meeting date reminder and call for agenda items	No later than 2 weeks prior to meeting date unless otherwise agreed by the client.
Preparation and distribution of agenda and associated documents	No later than 3 days prior to meeting date. Subject to the client providing documentation and TAS receiving the necessary information and approval.
Production of draft minutes	No later than 5 business days post meeting to be provided to meeting chair for approval.
Distribution and filing of minutes post meeting(s)	No later than 48 hours post approval by meeting chair.

#### Marketing & Communication Services

Service	Agreed Level of Service
<b>Website</b> <ul style="list-style-type: none"> <li>• Social media posting / updating calendar of events</li> </ul>	<p>No later than 2 business days after receiving posting information.</p>
<ul style="list-style-type: none"> <li>• Uploading to the website of newsletters, journal articles, publications and sponsorship details</li> </ul>	<p>No later than 3 days after receiving information.</p>
<b>Communications</b> <ul style="list-style-type: none"> <li>• Perform mass email blasts to members and subscriber databases as directed by the relevant authoriser</li> </ul>	<p>No later than 3 business days after receiving information.</p>
<ul style="list-style-type: none"> <li>• Review of all printed / web marketing materials such as newsletters</li> </ul>	<p>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.</p>

**Event Management (excludes major conferences)**

Service	Agreed Level of Service
Contracts / Venues and Accommodation	If included within the TAS contract, venue contracts are to be reviewed by the Leadership Team prior to client signing.
Online Registration Set Up	<p>Online registration page to be created within 3 working days of client approved event details in agreed format and with online payment gateway. Subject to receiving complete information (event checklist).</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>
Registrations	<p>TAS to monitor registrations and report on registrations regularly (fortnightly or as agreed by client) and follow up incomplete registration applications by email.</p> <p>Outstanding payments to be followed up on a weekly basis prior to event by email.</p>
Marketing / Communications	Content for communications to be distributed within 3 business days of receipt of material in agreed format.
Website	Content updates received by TAS from either the client / sponsor / speaker or exhibitor are to be posted no later than 3 business days after receipt of information.
Social Media	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. All clients are required to have a social media policy in place and TAS will not create content without a marketing plan. Timeframes as agreed between TAS and the client. All posts are to be approved by the client.
Onsite	If TAS is required to be onsite 10 working days' notice is required. As a guide, a minimum of 2 staff members shall be allocated per event. This shall be assessed on the complexity of the event.

**Important note:** These standards are based on TAS using their preferred registration systems (Currinda/Membes). If a different registration system is required standard timeframes may require adjustment.