



## **Association Manager Monthly Activity Report**

Name: Rebecca Beckley

Date: March – April 2019

### **Meetings Attended**

- Attended Conference Committee Meeting 3/22/19.
- Attended Executive Committee Meeting 4/12/19.
- Attended IFSRC meeting 4/23/19.
- Met with Laurie Lessner to learn Wild Apricot.
- Met with President Will Adamczyk and Treasurer Jennifer Pike for orientation.

### **Membership/ Customer Service**

- Joint ALA/MLA student membership reports received from ALA, created new MLA membership accounts and settled invoices from January 2018 – present. This backlog totaled about 80 members.
- Answered membership and conference emails and voicemails.
- Working daily on archiving contacts/lapsed members with no activity in last two years in order to keep our contact database under 2,000. The number constantly hovers under 2,000, so we may need to do a bigger archive sweep or increase our database size.
- Learned about the MLA membership levels and have answered questions. Learned to locate, generate, and create PDFs of invoices.
- Followed up with voicemails left previous to my starting.
- Replied to several W9 requests.

### **Conference**

- Worked with Conference shepherds for questions from conference speakers.
- Communicated with Conference director, Kristen. We met over the phone and are constantly in contact regarding conference questions, payments, vendor requests, etc.
- Created PDFs of the DocuSign 2019 speaker agreements and created Googled folder for all to access. I searched for the 2018 agreements. I only found two in old emails. I cannot locate all of the 2018 speaker agreements, I believe them to be gone when our DocuSign account lapsed. By storing the 2019 agreements in Google Drive, at least we can try to prevent this from happening in the future.
- Followed-up w/ Kristen about Square payment devices and past conference site payment problems.
- Communicated information from Conference Committee to Treasurer about cash boxes and cash amounts needed for the Conference.
- Familiarized myself with Reimbursement process for speakers.
- Worked with Laurie Lessner and Kristen Collins to identify issue with Conference Registration form not allowing Institutional Members to register. Began referring Institutional membership conference registration questions to Kristen.

## **IT**

- Setup new iPhone and updated AppleID. iPhone lost network connection, took into Apple store and Sprint store for repair.
- Purchased wireless mouse for Association Manager laptop.
- Researched replacements for Association Manager laptop.
- Purchased two Apple lighting adaptors for use with Square payment devices.
- Completed setup of two Square payment devices, updated bank account information and added authorized users for upcoming Conference.
- Backed up files on Association Manager laptop to Google Drive.
- Updated IFASR contact information site page.
- Created upcoming meetings in GoToMeeting. IFASR committee was not able to start a meeting without me, added organizers from various committees to GoToMeeting, hopefully this will prevent this problem in the future.

## **Outside Agencies**

- Introduced myself and maintaining communication with Mariel Colbert, ALA representatives who sends monthly joint student membership reports.
- Introduced myself and maintaining communication with Robert Schier, NELA representative who I am sending monthly joint MLA/NELA membership reports. Bob established deadlines and a template for me to send both total joint MLA/NELA members as well as new members from the past month. Jennifer Pike worked with me extensively to pull the most accurate reports from Wild Apricot.
- Forwarded emails to treasurer about taxes and account payments due.

## **Financial**

- Created reimbursement/payment form template.
- Worked with Jennifer Pike to respond to inquiries about payment status. Contacted Jennifer with refund requests.

## **Goals Met:**

- Familiarized myself and immediately started using Wild Apricot, GoToMeeting, DocuSign, Square.
- Followed up with backlog of voicemails and emails for Association Manager. Started organizing and cleaning out inbox. Backed up all files from Association Manager's laptop to Google Drive for safekeeping.

## **Goals for Next Month:**

- Update masslib.org website content
- Attend Legislative, Paralibrarian, Reference and User Services Committee Meetings.
- Make reimbursement form in WA or Google Form, post to website.
- Facilitate reimbursements for Conference Speakers.
- Meet deadline to send joint NELA reports to Bob Schier.
- Create process documentation for duties related to NELA and ALA monthly reports.
- Familiarize myself with GSuites.
- Familiarize myself with and Update EventKeeper.