

ASSOCIATION MANAGEMENT SERVICES PERFORMANCE REVIEW

Megram is an association management company that offers professional services to not-for-profit associations who do not have full-time staff or office resources. These include but are not limited to:

1. Association Headquarters
2. Board and Volunteer Support
3. Financial Management
4. Scholarship Management
5. Professional Designation Management
6. Membership Retention and Promotion
7. Meeting and Conference Management
8. Magazine and Newsletter Production
9. Graphic Design and Writing
10. Website Design, Hosting and Maintenance

Clients should undertake a review of the quality and level of service provided by Megram so that we may adapt and change to improve service.

Review Period: _____ to _____, 20__

By: _____

Title: _____

Association/Society: _____

Summarize performance results during the appraisal period in each area of major responsibility. Discuss significant contributions as well as areas that need improvement. Listed below are factors which contribute to service effectiveness. Indicate which response category best describes the service performance for each factor using the following scale:

1. **Above Expectation (Rate at Value = 10):** Indicates exceptional performance that consistently exceeds the requirements of the position. If this category is used, there must be written support with the specific comments and examples in the space provided or on an attached sheet.
2. **At Expectation (Rate at Value = 7 to 9):** Indicates performance that consistently meets the requirements of the position. This category will be that normally used to describe performance of high quality which meets and occasionally exceeds high standards.

3. **Below Expectation (Rate at Value = 4 to 6):** Indicates performance that requires improvement. Performance in this category is below that which is normally expected given the level of experience available. If this category is used, it must be supported with specific examples and comments on how performance is to be improved.
 4. **No Basis (Rate at Value = NA):** Used when the evaluator is unable to form a judgment on performance on this factor.
-

ADMINISTRATIVE SERVICES - Providing administrative support for Association and Board activities.

_____ Printing and distribution of mailings as directed by the President.

_____ Printing and distribution of membership materials required by members, committees, and interest groups.

_____ Recording the minutes of Board/Executive/Members and other meetings and mailing them to the appropriate parties.

_____ Responding to requests for administrative support in a timely and efficient manner.

_____ Preparing and submitting business reports and other documents on behalf of the Association as directed by the President/Chair

_____ Updating and maintaining a Procedures or Policy Manual

_____ Maintaining and expanding the association website and promoting that as a communications tool.

COMMENTS:

MEETING SERVICES - *Providing support for conferences and meetings*

_____ Organizing and setting up telephone conferences and distributing Agendas and conference materials in a timely fashion.

_____ Making arrangements for fact-to-face meetings including booking hotel rooms, menu selections, meeting room arrangements and seating.

_____ Communicating with exhibitors and coordinating conference exhibits if appropriate.

_____ Communicating and collaborating with Conference Planning Committee Chair and Local Arrangements Chair(s) if appropriate.

COMMENTS:

FINANCIAL MANAGEMENT - *Acting as fiscal agent and maintaining financial records for the Association.*

_____ Maintaining bank accounts in a fiscally responsible manner and keeping complete and accurate records of these accounts.

_____ Adhering to established procedures of the Association in all financial transactions.

_____ Making disbursements in a timely and accurate manner.

_____ Collecting membership fees and/or amounts owed the Association in a timely and accurate manner.

_____ Correctly accounting for all financial transactions of the Association and keeping accurate and complete records of these transactions.

_____ Provision of accurate, complete, and easily understood financial reports to the board and members

_____ Assist in developing or actually prepare a fiscally responsible annual budget for the Association.

_____ Monitor association expenses and report accordingly.

_____ Provide accurate and timely information to members who have questions about financial and budget matters.

_____ Making arrangements for an annual audit of the Association's financial records.

_____ Preparing and submitting tax reports and other financial documents on behalf of the Association

_____ Issue of tax receipts and maintenance of donors lists and records, including Direction Letters for donations made "In Trust" in accordance with CRA Regulations for Charities.

COMMENTS:

MEMBERSHIP SERVICES - *Maintaining membership/donor records for the Association.*

_____ Keeping the membership/donor database accurate and current.

_____ Striving to increase membership by actively sending renewal notices and making membership contacts.

_____ Providing mailing labels in a timely and efficient manner.

_____ Maintaining and providing useful membership statistics upon request

_____ Enhance membership by identifying new member-services that are "value-added" ones for fees paid.

COMMENTS

SPECIFIC SKILLS

Please rate Megram’s competency in the following skills or requirements:

_____ Organizational skills, including demonstrated attention to detail.

_____ Ability to understand and analyze financial data.

_____ Ability to take initiative and be a self-starting organization.

_____ Ability to efficiently schedule time and activities.

_____ Ability to maintain effectiveness in varying environments and with varying tasks, responsibilities, or people.

_____ Oral and written communication skills.

_____ Computer skills

_____ Design skills – website, newsletters, brochures, etc.

_____ Flexibility to travel to meetings as required.

_____ Other (indicate):

COMMENTS:

OTHER OBSERVATIONS/COMMENTS – *Items not covered above – attach additional pages if needed*

PRESIDENT/CHAIR SIGNATURE

DATE