



**Job Title:** Associate Director

**Reports to:** Executive Director

**Effective Date:** 1/1/2023

**Location:** Tampa Bay, Florida

**Salary Range:** \$60,000 - \$65,000

Please return your resume to The Solution Vice President, Valerie Smith, at [valerie@thesolutionwebsite.com](mailto:valerie@thesolutionwebsite.com) no later than November 15, 2022.

**Job Summary:**

The Associate Director is responsible for working with the Association's Leadership and Membership to manage the Association's operations. This providing operational excellence, helping committees build engaging events that meet the Association's budget goals, and developing marketing campaigns, all while managing the day-to-day administrative tasks of the organization. This position has the potential to grow into the Executive Director position.

**Specific responsibilities are listed in each scope of work for the specific client. The following represents the most frequent examples.**

**Duties/Responsibilities:**

General Administrative Support

The following administrative tasks are shared between the Associate Director and the Account Manager

- Member Inquiries: Reply to membership inquiries that come in from phone, email and website.
- Day to Day Activities: Reply to all association inquiries that come in from phone, email and web site, as well as requestion from EC, BOD, Chapter Presidents or Committee Chairs
- Calendar Management: Update calendar and keep current
- Webinar Management: Schedule and set up webinar invites to be sent out, create marketing campaigns for promotion, send out email invites, launch webinars, follow up activities
- Newsletter: Collect data from Committee Chairs and members of the EC, design, manage liaison approval process, deliver newsletter
- Social Media Management: Work with EC and Communications Chair to set social media schedule. Create all graphics for various events, education offerings, holidays, member retention and engagement, and advocacy efforts to be used on social media platforms

and work with volunteers submitting videos. Post content on social media platforms per set schedule.

- Website Updates: Make content changes on website as approved by the Committee liaison or EC
- Member Approval: Review pending membership applications, verify in good standing with NMLS, add to drip campaign, approve or deny members. Send all new members to appropriate chapter membership director or liaison.
- Website Technical Changes: Obtain technical requirements approved by EC and provide info to support team to complete the work
- Dropbox: Maintain integrity of digital storage, upload current and historical documents into existing folder structure

#### Committee Support

- Agenda: Obtain agenda items from Committee Chairs and create agenda and send to Committee Chair committee members, and EC liaison.
- Meeting Minutes: Take minutes and send to Committee Chair committee members, and EC liaison.
- Communications with Committee Chair and Liaison: Reply to questions and provide support to Committee Chairs

#### Chapter Support

- Board Approved Financials: Collect from Chapter each month
- Board Meeting Minutes: Collect from Chapter each month
- Chapter Retention Reports: Collect from Chapter each month
- Corporate Annual Reports: Collect from Chapter each year
- Tax Returns: Collect from Chapter each year
- D&O Insurance: Collect from Chapter each year
- Communications with Chapter Presidents and Liaison: Reply to questions and provide support to Chapter Presidents
- Set up and manage chapter web page on web site, including all updates to text and photos.
- Set up Chapter Presidents meetings at request of president and send agenda, meeting notice, reminders, and minutes to EC and Chapter Presidents.
- Send monthly emails to chapter president detailing all missing monthly items that have not been received.

## Membership Reports

- Drop Past Due Members: Monthly, remove members who have not paid from MMS (60 days past due)
- State and Chapter Reports: Create membership reports for both the state and EC (by Chapter) and the Chapters (alphabetically by last name) and deliver to EC and Chapter contacts. These reports include current members, members who will be terminated next month without renewal (30 days past due), members who were terminated due to non-renewal (60 days past due).
- Send monthly records request to Florida Office of Financial Regulation requesting newly licensed LO's in Florida and send email invitation for complimentary membership.
- Set up New Member Zoom for new members. Invite all eligible new members, update presentation slide deck, coordinate CLIENT presenters, and send follow up thank you to all who registered for meeting.

## Quarterly Meetings (Includes strategic planning meeting)

- Notify all of upcoming meeting: Send reminder to BOD, Committee Chairs and Past Presidents regarding upcoming meeting
- Book Venue, AV, and F&B: Location booked, banquet orders, catering menus, estimated pricing, etc.
- Agenda Items: Request agenda items for the BOD meeting
- Final Event Budget: Provide President with the final budget for the event
- Board Packets: Prepare Board packets in accordance with guidelines, deliver to President for approval
- EC Hotel Reservations: Make reservations for EC, committee chairs, and staff at the designated hotel, send confirmation numbers to all
- Committee agendas: Request Committee Chairs to provide agenda items for meeting and create agendas.
- Deliver Board Packets: send to President and Past President for approval prior to sending out to BOD
- Calendar Update: Update calendar with dates of event
- Before Meeting: Put together books, make sure rooms are set up, agendas and supplemental forms are printed, EC package printed for all EC members.
- Set up Meeting Space Night Before: for Leadership meeting, tent cards for seating, agendas, etc.
- BOD Meeting Minutes: Take minutes at BOD meeting

- Meeting Activities: Gather motion slips from committee chairs, prepare the roll call sheet and gather proxies, project any information requested by EC to be shared.
- Work with President to schedule upcoming year's retreat and Quarterly meeting dates and locations.
- See SOP for full timeline and responsibilities.

#### Annual Convention

- Attend site visits, work with EC and committee chair to select dates and locations. Oversee all aspects of contract negotiation
- Responsible for full implementation of Annual Conference and Tradeshow. See SOP for full timeline and responsibilities.

#### Education

- Approval - complete NMLS application process for new course
- Course Material – work with EC and Education Committee to create or find course materials to submit to NMLS
- Scheduling – work with EC and Education Committee to set up dates, locations, and instructors for all in person classes including boot camps, PE, and CE.
- Scheduling – find site locations for all in person classes and negotiate contracts
- Registration – set up all class registrations and manage all aspects of registration from event set up to email marketing, including registration confirmations and reminders.
- Scheduling– update Education portion of web site to reflect class offerings
- Scheduling – work with EC and Education Committee to set up any online courses for PE and CE.
- Annually – secure course materials for instructors and students and distribute appropriately.
- Compliance – send instructors class rosters, sign in sheets, code of conduct forms, certificates of completion, and other required documents prior to each class.
- Compliance – enter all classes into NMLS credit banking system
- Compliance – upon receipt of class rosters from instructors following each class, immediately bank all credits in the NMLS system.
- Answer all member and non-member questions related to classes and credits and refer to NMLS, OFR, or appropriate agency when needed.