

## **Administrative Assistant**

1. **Purpose:** Provides administrative support to the organization including managing the Society's mail, receiving and recording dues, registrations for workshops and the annual meeting, and other income.
2. **Term of Office:** Minimum of three years with an overlap of the incumbent and incoming administrative assistants. The term consists of one year as apprentice, one year solo, and one year as mentor to the incoming Administrative Assistant. Appointed by President with Executive Board approval.
3. **Voting Status:** Ex-officio member.
4. **Major Duties/Responsibilities:**

### **Mail**

- A. Maintains SGA Post Office Box. Retrieves and distributes all incoming mail to the appropriate officer.
  - a. Treasurer - Bank statements, checks, invoices for payment. When forwarding checks, always include a check report detailing check numbers, itemization of total amount, etc.
  - b. Newsletter Editor - Newsletters and information from other historical/cultural organizations. Editor uses this information as fillers for the newsletter.
  - c. Provenance editorial staff - publications for review, reprint or quote permission requests.
  - d. Subscriptions Manager - Institution renewals, requests for invoice and claims; subscription services rate information requests; requests for back issues.
  - e. Forwards other material to appropriate officers as needed.

### **Membership**

- B. Receives and processes new member applications and renewal forms including payments and scholarship/award donations (see Scholarships below).
  - a. Stamps PAID and notes check # (or "cash") and the amount paid on renewal form or application.
  - b. Stamps checks with SGA account number.
  - c. Sends all checks and cash to Treasurer for deposit.
  - d. Mails Provenance issue, or arranges for it to be mailed, if published and distributed prior to renewal.
- C. Maintains Membership Database, which includes member record of payments and contact information.
- D. Maintains member and registration information in Wild Apricot, or online system.
  - a. Verifies or edits member renewal dates.
  - b. Updates contact information.
  - c. Deletes duplicate registrations.
  - d. Approves manual registration payments.
  - e. Approves online membership applications.
  - f. Other issues relating to membership and registration and general upkeep of information.

- E. Responds to inquiries regarding SGA membership.
- F. Mails or emails renewal notices according to the following schedule:
  - a. First notice: Distributed to attendees at Annual Meeting in the meeting packets; mailed to all non-attendees
  - b. Second notice: February
  - c. Final notice: March [direct solicitation from Membership Chair]
- G. Provides list of those members who have not renewed after second notice to the Membership Committee Chair for direct solicitation.
- H. On an on-going basis forwards to the SGA Listserv Manager the names and email addresses of new members for inclusion in the SGA listserv (except for those who denote on their membership form that they do not want to be added to the listserv).
- I. On an on-going basis forwards to the Membership Committee Chair the names and addresses of new members for new member packets.

### **Scholarships/Awards**

- J. Receives and processes manual donations to the SGA scholarship and award funds, forwarding checks and cash to the Treasurer.
- K. Records online donations in Member Database
- L. Notifies the President when a donation of \$50 or more is received and forwards the name and address of donor for acknowledgement.
- M. At the end of the calendar year, sends a list of all scholarship donations received via mail or online to the Scholarship Chair for inclusion in the newsletter.

### **Annual Meeting**

- N. Processes and records all registrations, both mail-in and online.
- O. Tracks all payments.
  - a. All checks and cash forwarded to Treasurer with check report.
  - b. Notifies Treasurer of refunds due.
- P. Maintains database of registrants.
- Q. Notifies manual payment registrants that their registration was received and sends receipt via email.
- R. Notifies registrants of any problems with their registrations.
- S. Responds to questions regarding registration.
- T. Prepares material for registration packets:
  - a. Name tags
  - b. List of meeting registrants

- c. Renewal forms
- d. Folder labels

U. Other duties as requested.

### **Workshops**

V. Processes and records all registrations, both mail-in and online.

W. Tracks all payments.

- a. All checks and cash forwarded to Treasurer with check report.
- b. Notifies treasurer of refunds due.

X. Maintains database of registrants.

Y. Notifies manual payment registrants that their registration was received and sends receipt via email.

Z. Notifies registrants of any problems with their registrations.

AA. Responds to questions regarding registration.

### **Other Duties**

BB. Provides mailing labels or contact lists to all officers for SGA activities, and to other archives/libraries/historical organizations when approved by the Board. This involves merging the file, printing the labels, and mailing them to the person or organization.

CC. Responds to requests regarding membership or registration.

DD. Consults with Treasurer by budget deadline to determine the budget for the next fiscal year.

EE. Forwards to the SGA Archivist any non-current files and turns over the current files to the incoming Administrative Assistant.

**5. Approved by the Executive Board: October 12, 2010**