

Job Description for Vice-President Member Services

[Amended January 2018]

The Vice-President Member Services, also known as VP Membership, is responsible for gaining and supporting members through knowledge sharing, professional development and networking events around NZ.

Supported by three volunteer events committees in Auckland, Christchurch and Wellington the VP Membership provides guidance and strategic input from the Board to those committees. The VP Membership has financial accountability for the Membership portfolio budget allocation that primarily supports regional professional development events.

The goal of VP Membership is to grow membership, support the BA community, and ensure value to our members. Together with VP Marketing and Communications the VP Membership will pursue opportunities to offer value to IIBA Members first.

The workload of the portfolio is relatively light and stable as the portfolio is maintained with small regular time committed throughout the year.. The VP Membership leads and is supported by other Board portfolio holders and the Regional Events Committees to engage and participate in sharing IIBA NZ Chapter knowledge and IIBA membership information with key sectors of our IIBA NZ member community (eg Victoria University student members).

Previously a significant calendar event for the VP Membership portfolio has been the annual IIBA NZ roadshow which is a series of professional development events run outside of our Regional Events areas. This event series is led by VP Membership and delivered through team effort of the IIBA NZ Board and volunteers.

The VP Membership holds one of the largest budgets which in turn requires a high degree of transparency and control of the budget and expenses being processed. This large budget is due to the three event committees running concurrently, all having \$500/month expense for venue, food and beverage – plus the annual roadshow which can cost in the region of \$5k-\$7k. The budget is set at the start of the financial year as part of the annual IIBA NZ Board planning day. Any expenses outside the budget require board approval.

Skills

- Working knowledge of the benefits of the IIBA.
- Working knowledge of the benefits of IIBA membership (both for IIBA HQ and IIBA NZ Chapter).
- Working knowledge of the BABOK® and of CBAP® and CCBA® certifications.
- Capacity and capability to promote the IIBA and IIBA membership.
- Ability to develop a good working relationship with events committees, potential professional development opportunity providers and approach speakers for events.

Relationships

- IIBA NZ Board
- IIBA VP Professional Development and Certification
- IIBA Events Committees
- Tertiary Institutions
- The NZ BA Community

Responsibilities and Current Activities

No	Actions/ Activities	Frequency	Resource Requirements	Monitoring/ Update
1.	Prepare budget	Annually, May	2 hours	1. Prepare budget for the coming year, forecasting expected expenses to support achievement of IIBA NZ Chapter goals. Membership portfolio budget focus is: <ol style="list-style-type: none"> Event committees & number of events Plan for the roadshow Networking plans (budget for calls, coffee, dinner etc) Travel costs.
2.	Manage and maintain Membership email account.	Ad Hoc	2hr/month	1. Respond to queries and/or refer to another Board member who can help.
3.	Monthly membership reporting	Monthly	0.5hr/month	1. Receive monthly membership list and update reports (template here) and membership analysis. 2. Receive member list 3. Update NZ Chapter template (report). 4. Send new members list , (as per restricted sharing conditions) 5. Prepare analysis.
4.	Create IIBA NZ membership summary (currently infographic chart)	Monthly	0.5hr/month	1. Update analysis and commentary of month in review and month ahead. 2. Update into infographic and post on linked in, IIBA NZ website.
5.	Support Regional events committees (Auckland, Wellington and Christchurch)	Quarterly	6 hr/quarter	1. Provide insight and guidance from IIBA board on member focus / event goals. 2. Develop an annual calendar/plan for the events. 3. Clarify budget and financial items e.g. limit for catering, venue hire etc. N.B. In scope events include member and non-member workshops and presentations, study and discussion groups. Not Accelerator groups which are remit of VP Certification.

6.	Review and approve expense claims for events committees	Ad Hoc	2 hr/month	<ol style="list-style-type: none"> 1. Review expense claim, provided receipts. 2. Match the claim to the budget, confirm appropriate budget line and validate expense is acceptable. 3. If acceptable, approve expense claim to treasurer and cc claimant.
7.	Review of meetup memberships vs iiba membership	Semi-annually		<ol style="list-style-type: none"> 1. Distribute a list of IIBA membership (name and ID only) to each event sub-committee for their update of member status on meetup.com
8.	Lead the IIBA (Winter or Spring) Roadshow with support from IIBA Board and Regional volunteers	Annually, between June - October	20 hours	<ol style="list-style-type: none"> 1. Create and maintain tracking against the delivery plan and ensure support to manage each of the areas required to deliver professional development roadshow for members: <ul style="list-style-type: none"> • locations, • venue • catering • local volunteer support, • sponsorship of venue/catering costs • Theme and/or topic • Speakers • marketing
9.	Attend IIBA Roadshow	As above		<ol style="list-style-type: none"> 1. This is optional but desirable.
10.	Issue PD/CDU certificate for roadshow attendance	Annually	2 hours	<ol style="list-style-type: none"> 1. Certificate prepared and issued to presenters/facilitators and attendees.
11.	Prepare meeting pack for monthly board meeting	Monthly	1 hour	<ol style="list-style-type: none"> 1. Prepare update on: 2. membership # and trend 3. Upcoming events 4. Past achievements 5. Action item update 6. Update on strategic items (relevant to portfolio). 7. Send to secretary one week prior to board meeting.
12.	Attend monthly board meeting call	Monthly	1 hour attend.	<ol style="list-style-type: none"> 1. Pre-read meeting pack, highlight any required agenda items prior to meeting. 2. Attend meeting.
13.	Ensure all membership portfolio documents are updated in Google Drive	Ad Hoc		All documents stored on Drive. Old/irrelevant version archived. Access/security correct.

Appendices

Operational Guide

Events Committees Information

<https://drive.google.com/open?id=0BwkXd6yQCdhebERLQVhQdndOLVE>

Reports

<https://drive.google.com/open?id=0BwkXd6yQCdhedIZ1RExEdTl6amM>

Reports from IIBA HQ, template for monthly membership reporting, analysis papers and infographic examples.

Winter Series

This event series is the single biggest task for VP Memberships. Review the 2015 materials for examples of content, promotional and marketing materials, attendance registers and CDU credits.

<https://drive.google.com/open?id=0BwkXd6yQCdheN0xXaWRjMGVNM2M>