



## Administrative Board Meeting

January 13, 2017

Worcester Public Library

10 a.m.

### AGENDA

#### Call to order

Approval of minutes of November 22, 2017 Administrative Conference Call

Treasurer's report

President's Report

Vice President's Report

Nominating Committee Report

Old Business

Website Updates

New Business

FY 18 Budget Requests from Committees

Review of the MLA Strategic Planning Committee's work for comment

Employee Review Discussion

Adjourn



## MLA Association Manager: Job Description

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### Association Support

The Association Manager will establish and maintain an effective infrastructure for MLA; be proactive in recommending policy and new programs for the Administrative Board's consideration; provide information and guidance to facilitate the active participation of the Board and membership; follow through on Board decisions; and keep the Board and membership informed of the actions, programs, operations and condition of MLA.

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### Office

The Association Manager will provide an office located in Massachusetts that will serve as the principal service location for MLA. Computer, mailings and mail delivery, phone answering, referrals, management, technical, online, email, social media, clerical, and all other services will be rendered for the entire MLA through this location. Reliable personal transportation is required at the sole expense of the Association Manager, except that mileage costs will be reimbursed at then-effective IRS rates.

### Technology

The Association Manager will utilize MS Office software in the conducting of MLA business and reporting, and any other agreed upon computer and printer usage, email and social media, and web management software. The Association Manager will utilize the MLA-owned laptop and cell phone provided for all business associated with MLA. All equipment loaned to the Association Manager is for the sole purpose of conducting the business of MLA, and not for the personal use of the Association Manager. Equipment must be kept in reasonable working order.

### Conference Support

The Association Manager will liaise with the Conference Manager ~~is responsible for regarding~~ conference logistics, registration, and implementing conference related decisions of the Executive Board. The Association Manager assists ~~a volunteer~~ Conference Manager as necessary ~~matters~~ with the goal of ensuring the overall success of the conference.

### Meetings

The Association Manager will provide support to the Executive Board by regularly attending bimonthly Executive Board meetings and monthly Administrative Board meetings ~~and requested, bimonthly Executive Board meetings~~. The Association Manager will attend Section and Committee meetings as necessary. The Association Manager will administer the calendar for MLA and is expected to be aware of all upcoming meetings and programs, and to assist the volunteers in meeting mailing, notification, and programmatic deadlines.

7-4027-15



## MLA Association Manager: Job Description

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### Publications

MLA's website at <http://mla.memberlodgemasslib.org> is the main publication of MLA. The Association Manager will work with member editors and committees to ensure timely publication of all materials on the website and email newsletter; is responsible for ensuring that the website is properly hosted and functioning correctly; maintains the website including checking links, adding feeds and social media apps; participates in social media outreach; and maintains and develops email distribution lists;— in support of the Executive and Administrative Boards. ~~provides creative online design ideas for furthering the goals of MLA; and provides troubleshooting expertise to members as needed.~~

Field Code Changed

### Financial Services

The Association Manager is responsible for the day-to-day financial operations of MLA, and for keeping the volunteer-elected Treasurer informed of all financial matters affecting MLA; makes bank deposits, prepares checks, monthly statements, and budget reviews for Committees and Sections; tracks spending and works with the Executive Board to help MLA meet its goals while maintaining financial health; ensures that MLA complies with all filing requirements of local, state or federal governments.

### Board Orientation

In consultation with the Administrative Board, the Association Manager will support, develop and implement a comprehensive orientation program for new Board members, including an full-day orientation program and the annual updating and maintenance of the virtual Board Manual.

## **SERVICE OUTLINE**

### MLA Headquarters

The Association Manager will provide MLA with a headquarters office including the following services:

- Provide a dedicated office space and maintain an orderly, well organized filing system for efficient usage and retrieval of MLA documentation and supplies.
- Provide space for and maintain MLA-owned equipment including but not limited to a laptop computer, multifunction printer/scanner/copier, cell phone, MLA printed brochures and other publicity documentation and signage, and necessary supplies.
- Maintain a dedicated telephone number with voice mail function that will be checked and responded to ~~regularly during the hours of 10 a.m. to 3 p.m. Mondays through within two business days. Thursdays, and 10 a.m. to 2 p.m. Fridays. Autoreply will be in operation.~~

7-4027-15



## MLA Association Manager: Job Description

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- Maintain a dedicated email account that will be checked and responded to regularly during the hours of 10 a.m. to 3 p.m. Mondays through Thursdays, and 10 a.m. to 2 p.m. Fridays within two business days. Autoreply will be in operation.
- Contract for and maintain a dedicated post office box to which all MLA mail will be directed; this PO box should be conveniently located and checked at least twice once each week, during the months of June through December, twice each week during the months of January through May.
- Respond within two business days and in a ~~timely and~~ professional manner to all incoming mail, phone calls, emails, requests for information, and membership inquiries. Respond promptly with the goal of no later than 24 hours response unless the office is closed for designated, mutually agreed upon vacations, holidays or off-premises MLA business.
- Maintain MLA's financial records for seven (7) previous calendar years and all other records for two (2) years, forwarding older records to MLA storage in consultation with the MLA Archivist.
- Maintain and retain ALL MLA records as MLA property for return to the Association, upon resignation or termination.

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### Association Support

The Association Manager will support the MLA Administrative Board and MLA Executive Board with the routine and regular functions of the Association, including but not limited to the following services:

- Maintain complete, accurate and up to date membership records; produce membership lists as needed.
- Produce notices for meetings and programs to the membership as needed.
- Attend bimonthly Administrative Board meetings as requested.
- Attend bimonthly Executive Board meetings regularly.
- Attend ~~one~~ Conference Committee meetings per month as requested.
- Attend other MLA Section and Committee meetings as required in consultation with the MLA President.
- Provide annual updates of chapter information to the American Library Association's Chapter Relations Office, including names of officers, budget, bylaws, and conference dates.
- Assist in preparing an orientation session for all new Board members annually at the June meeting. Prepare a packet of materials, including MLA stationery, reimbursement forms, bylaws, and policy manual for distribution to new Board members at Board orientation.



- Prepare and maintain a stock of membership brochures, stationery, bylaws, and policy manuals for distribution upon request.

~~Perform administrative and editing duties to ensure timely and accurate publication of the Bay State Libraries newsletter.~~

-  Maintain and edit MLA's website and Facebook page to ensure that all links work properly; administer passwords and access for Board members to ensure that timely and appropriate content management is given priority; assist Board members with access and content as necessary.
- Maintain and update the MLA Administrative Calendar.

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#### Financial Management and Support

The Association Manager provides accounts payable, accounts receivable, bookkeeping, and financial record keeping services, including but not limited to the following:

- Works in regular communication and consultation with the MLA Treasurer to ensure that the business of MLA is conducted in a legal, timely, efficient, transparent, and honorable manner, according to established policy and procedure.
- Collects, deposits, and accounts for all MLA monies.
- Processes incoming checks and makes deposits or mails as appropriate.
- Reviews invoices, prepares checks for signature, and mails payments as appropriate.
- Prepares financial reports monthly and annually as required and mutually agreed upon.
- Assists the MLA Treasurer in the production of an annual financial report for the Annual Membership Meeting including revenues, expenditures, fund transfers, scholarship bequests and any activities of the investment committee.
- Arranges for annual audit report by an independent auditor and presents the report of the auditor to MLA Administrative Board.
- Ensures that all financial reports are easy to read and understand with explanations as required.
- Provides "Request for Payment" forms and Tax Exemption Certificates to members and vendors as needed.
- Maintains the financial records of the Association, including tax filings and reports to the Secretary of the Commonwealth.
- Maintains legal incorporation papers of the Association, insurance records, and other documentation as required.



- Serves as the Recording Secretary and advisor to the Investment Committee and attends meetings as required.
- Works with MLA Administrative Board to plan and prepare the annual budget as required.
- Provides copies of financial statements to the MLA Treasurer, MLA Administrative Board and MLA Executive Board in preparation for each meeting.
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**Annual self-review for Sarah Hagan, Association Manager of Massachusetts Library Association (MLA)  
November 1, 2014**

Major responsibilities	How do you think you did each job?	Can this job be done in a better way?
<p><b><u>Association Support</u></b></p> <p>The Association Manager will establish and maintain an effective infrastructure for MLA; be proactive in recommending policy and new programs for the Administrative Board's consideration; provide information and guidance to facilitate the active participation of the Board and membership; follow through on Board decisions; and keep the Board and membership informed of the actions, programs, operations and condition of MLA.</p> <p>The Association Manager will support the MLA Administrative Board and MLA Executive Board with the routine and regular functions of the Association, including but not limited to the following services:</p> <p>Maintain complete, accurate and up to date membership records; produce membership lists as needed.</p> <p>Produce notices for meetings and programs to the membership as needed.</p> <p>Attend bimonthly Administrative Board meetings.</p> <p>Attend bimonthly Executive Board meetings.</p> <p>Attend one Conference Committee meeting per month.</p>		

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<p>Attend other MLA Section and Committee meetings as required in consultation with the MLA President.</p> <p>Provide annual updates of chapter information to the American Library Association's Chapter Relations Office, including names of officers, budget, bylaws, and conference dates.</p> <p>Assist in preparing an orientation session for all new Board members annually at the June meeting. Prepare a packet of materials, including MLA stationery, reimbursement forms, bylaws, and policy manual for distribution to new Board members at Board orientation.</p> <p>Prepare and maintain a stock of membership brochures, stationery, bylaws, and policy manuals for distribution upon request.</p> <p>Perform administrative and editing duties to ensure timely and accurate publication of the <i>Bay State Libraries</i> newsletter.</p> <p>Maintain and edit MLA's website and Facebook page to ensure that all links work properly; administer passwords and access for Board members to ensure that timely and appropriate content management is given priority; assist Board members with access and content as necessary.</p>		
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Major responsibilities	How do you think you did each job?	Can this job be done in a better way?
<p><u>Office</u></p> <p>The Association Manager will provide an office located in Massachusetts that will serve as the principal service location for MLA. Computer, mailings and mail delivery, phone answering, referrals, management, technical, online, email, social media, clerical, and all other services will be rendered for the entire MLA through this location. Reliable personal transportation is required at the sole expense of the Association Manager, except that mileage costs will be reimbursed at then-effective IRS rates.</p> <p>The Association Manager will provide MLA with a headquarters office including the following services:</p> <p>Provide a dedicated office space and maintain an orderly, well organized filing system for efficient usage and retrieval of MLA documentation and supplies.</p> <p>Provide space for and maintain MLA-owned equipment including but not limited to a laptop computer, multifunction printer/scanner/copier, cell phone, MLA printed brochures and other publicity documentation and signage, and necessary supplies.</p> <p>Maintain a dedicated telephone number with voice mail function that will be checked and responded to regularly during the hours of 10 a.m. to 3 p.m. Mondays through Thursdays, and 10 a.m. to 2 p.m. Fridays.</p> <p>Maintain a dedicated email account that will be checked and responded to regularly during the hours of 10 a.m. to 3 p.m. Mondays through Thursdays, and 10 a.m. to 2 p.m. Fridays.</p> <p>Contract for and maintain a dedicated post office box to which all MLA mail will be directed; this PO box should be conveniently located and checked at</p>		

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November 1, 2014**

<p>least twice each week.</p> <p>Respond in a timely and professional manner to all incoming mail, phone calls, emails, requests for information, and membership inquiries. Respond promptly with the goal of no later than 24 hours response unless the office is closed for designated, mutually agreed upon vacations, holidays or off-premises MLA business.</p> <p>Maintain MLA's financial records for seven (7) previous calendar years and all other records for two (2) years, forwarding older records to MLA storage in consultation with the MLA Archivist.</p>		
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Major responsibilities	How do you think you did each job?	Can this job be done in a better way?
<p><u>Technology</u></p> <p>The Association Manager will utilize MS Office software in the conducting of MLA business and reporting, and any other agreed upon computer and printer usage, email and social media, and web management software. The Association Manager will utilize the MLA-owned laptop and cell phone provided for all business associated with MLA. All equipment loaned to the Association Manager is for the sole purpose of conducting the business of MLA, and not for the personal use of the Association Manager. Equipment must be kept in reasonable working order.</p>		

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Major responsibilities	How do you think you did each job?	Can this job be done in a better way?
<p><u>Conference</u></p> <p>The Association Manager is responsible for conference logistics, registration, and implementing conference related decisions of the Executive Board. The Association Manager assists a volunteer Conference Committee in all financial, technical, and logistical matters with the goal of ensuring the overall success of the conference.</p> <p>The Association Manager will provide significant assistance to MLA Administrative Board and MLA Conference Committee in ensuring the general success of the annual conference and annual meeting. Duties include but are not limited to the following:</p> <p>Attends Conference Committee meetings to insure ongoing, timely, and accurate information is documented and disbursed.</p> <p>Monitors progress of Conference planning tasks and ensures that schedule is maintained.</p> <p>Surveys locations and hotel accommodations for annual conference.</p> <p>Negotiates all MLA major meeting site and supplier contracts as mutually agreed.</p> <p>Assists the Conference Committee in meal, snack and beverage selection; orders all food and beverages and negotiates service and price with the facility or outside suppliers.</p>		

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<p>Contracts for bus or van transportation if needed.</p> <p>Provides registration and site management for Annual Conference.</p> <p>Plans, coordinates and meet with Administrative Board, Conference Co-Chairs and Exhibitor Liaison for both pre and post conference debriefings.</p> <p>Works with the Conference Committee to facilitate mailing of Conference brochure in a timely manner.</p> <p>Selects printer vendor, negotiates price, and oversees the timely printing and mailing of the Conference brochure, registration forms, and signage as supplied by the Conference Committee.</p> <p>Manages all arrangements and business dealings with exhibitors.</p> <p>Oversees the management of Exhibitor Liaison and committee-selected volunteers related to exhibits.</p> <p>Maintains and updates exhibitor list for previous two years.</p> <p>Produces and mails exhibitor prospectus, including reservation forms, exhibitor information, and conference announcement; follows up as needed.</p> <p>Responds promptly to inquiries from exhibitors and potential exhibitors.</p> <p>Receives and processes registration forms, deposit checks,</p>		
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<p>inputs names, assigns exhibit space and produce badges.</p> <p>Oversees the production and preparation of exhibitor packets, including evaluation forms, attendee lists, conference program, and other pertinent material as needed.</p> <p>Acts as site coordinator for exhibit space, electrical, telephone, Internet, security and other logistical requirements with hotel.</p> <p>Responds promptly to inquiries from attendees and potential attendees.</p> <p>Maintains attendee list for two previous calendar years.</p> <p>Processes registration forms, deposit checks, inputs names, and produces badges.</p> <p>Produces labels and mail communications pertinent to the Annual Conference.</p> <p>Oversees the production and collation of attendee packet information including Conference program, evaluation forms, and other pertinent information provided by the Conference Committee.</p> <p>Produces and delivers all badges, tickets, attendee envelopes and conference signage.</p> <p>Acts as site coordinator for annual conference. Communicates and coordinates requests for meeting rooms, AV equipment, setup, food and beverage, and billing with conference site. Determines number of meals to serve in consultation with Conference Chair.</p>		
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**Annual self-review for Sarah Hagan, Association Manager of Massachusetts Library Association (MLA)  
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<p>Assigns and trains temporary volunteer help for registration desk and exhibit registration desk as required. Oversees the management of committee volunteers related to on-site registration management and exhibitor management.</p> <p>Assists with and attends the Annual Business Meeting held at the Annual Conference.</p> <p>Prepares evaluation and survey forms with input from the Conference Committee and tabulates results.</p> <p>Prepares final attendance list and reports for MLA Executive Board and Conference Committee after the conference.</p>		
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November 1, 2014**

Major responsibilities	How do you think you did each job?	Can this job be done in a better way?
<p><u>Meetings</u></p> <p>The Association Manager will provide support to the Executive Board by attending monthly Administrative Board meetings and bimonthly Executive Board meetings. The Association Manager will attend Section and Committee meetings as necessary. The Association Manager will administer the calendar for MLA and is expected to be aware of all upcoming meetings and programs, and to assist the volunteers in meeting mailing, notification, and programmatic deadlines.</p>	<p>Meetings have gone smoothly and I have assisted with notifications, etc. as requested.</p>	<p>Not that I can think of but I am open to suggestions.</p>
<p><u>Publications</u></p> <p>MLA's website at <a href="http://mla.memberlodge.org">http://mla.memberlodge.org</a> is the main publication of MLA. The Association Manager will work with member editors and committees to ensure timely publication of all materials on the website and email newsletter; is responsible for ensuring that the website is properly hosted and functioning correctly; maintains the website including checking links, adding feeds and social media apps; maintains and develops email distribution lists; provides creative online design ideas for furthering the goals of MLA; and provides troubleshooting expertise to members as needed.</p>	<p>Please see the "Association Support" section above for information on the website and newsletter.</p>	

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Major responsibilities	How do you think you did each job?	Can this job be done in a better way?
<p><u>Financial Services</u></p> <p>The Association Manager is responsible for the day-to-day financial opera of all financial matters affecting MLA; prepares checks, monthly statements, and budget reviews for Committees and Sections; tracks spending and works with the Executive Board to help MLA meet its goals while maintaining financial health; ensures that MLA complies with all filing requirements of local, state or federal governments.</p> <p>The Association Manager provides accounts payable, accounts receivable, bookkeeping, and financial record keeping services, including but not limited to the following:</p> <p>Works in regular communication and consultation with the MLA Treasurer to ensure that the business of MLA is conducted in a legal, timely, efficient, transparent, and honorable manner.</p> <p>Collects, deposits, and accounts for all MLA monies. Processes incoming checks and makes deposits or mails as appropriate. Reviews invoices, prepares checks for signature, and mails payments as appropriate. Prepares financial reports monthly and annually as required and mutually agreed upon.</p> <p>Assists the MLA Treasurer in the production of an annual financial report for the Annual Membership Meeting including revenues, expenditures, fund transfers, scholarship bequests and any activities of the investment committee.</p> <p>Arranges for annual audit report by an independent auditor and presents the report of the auditor to MLA Administrative Board. Ensures that all financial reports are easy to read and understand with explanations as required.</p> <p>Provides "Request for Payment" forms and Tax Exemption Certificates to members</p>	<p>I have had a close relationship with Ryan Livergood, the MLA Treasurer and I have prepared checks, monthly statements and budget reviews for him on a regular basis. I also worked with Ryan to create the 2015 MLA budget.</p> <p>I have deposited checks on a regular basis and kept QuickBooks accounts. I have spent a significant amount of time reconciling MLA's accounts, tracking undeposited checks and paying unpaid bills from the past to get MLA's accounts up to date. This is an ongoing process.</p> <p>Payments to vendors and other requestors have been made promptly after review by the Treasurer.</p> <p>I am working with MLA's tax accountant on the prompt filing of tax materials and making arrangements for the yearly audit.</p> <p>Additionally, I have made sure MLA's insurance, server, website, charge account and other bills are paid promptly and kept up to date.</p>	<p>As I use QuickBooks I am always on the lookout for new features that will streamline financial services processes.</p> <p>Recently, I downloaded the mobile app from Citizen's Bank and have used that to make deposits of MLA's checks quicker. I have found this to be a helpful tool.</p>

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<p>and vendors as needed.</p> <p>Maintains the financial records of the Association, including tax filings and reports to the Secretary of the Commonwealth. Maintains legal incorporation papers of the Association, insurance records, and other documentation as required.</p> <p>Serves as the Recording Secretary and advisor to the Investment Committee and attends meetings as required. Works with MLA Administrative Board to plan and prepare the annual budget as required. Provides copies of financial statements to the MLA Treasurer, MLA Administrative Board and MLA Executive Board in preparation for each meeting.</p>		
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<b>Major responsibilities</b>	<b>How do you think you did each job?</b>	<b>Can this job be done in a better way?</b>
<p><b><u>Board Orientation</u></b></p> <p>In consultation with the Administrative Board, the Association Manager will develop and implement a comprehensive orientation program for new Board members, including a full day orientation program and the annual updating and maintenance of the Board Manual.</p>	<p>All of the Board materials were put onto a designated webpage this year and I received good feedback on this from several members. I am still updating past meeting minutes and agendas but much of the work is finished.</p>	<p>As I review MLA information I keep in mind what might be helpful for the orientation process and add pertinent information.</p>

Massachusetts Library Association  
**Employee Evaluation Form**

<b>Name</b>	<b>Job Title</b>
<b>Pay rate per month</b>	<b>Pay rate per year</b>
<b>Employment date</b>	<b>Hours scheduled in a typical week</b>
<b>Reasons for absences over 3 consecutive days:</b>	
<b>Date and rating of previous appraisal</b>	<b>Date this appraisal was conducted</b>
<b>Date of next appraisal</b>	<b>Rating of this appraisal</b>

List no less than four major responsibilities of the employee 's present position in order of importance, using the Job Description. Indicate by an E, M, NI, or D the performance for each of these responsibilities.

- E= *Exceeds Expectations* – consistently exceeds job requirements
- M= *Meets Expectations* - meets and may exceed all major job requirements.
- NI= *Needs Improvement* - occasionally does not meet some job requirements.
- D= *Does Not Meet Expectations* - performance is marginal or unacceptable.

Weight	Major responsibilities	Rating	Comments
	<p><b>Business Support:</b> Provide MLA with a headquarters office. Check and respond to voice mail and email within 24 hours during office hours of 10-3 Monday through Thursday and 10-2 Fridays. Check and maintain a PO Box and respond to mail within 24 hours.</p>	E <input type="checkbox"/> M <input type="checkbox"/> NI <input type="checkbox"/> D <input type="checkbox"/>	
	<p><b>Association support:</b> Maintain accurate membership database, attend Administrative Board, Executive Board and Conference Committee meetings, and other section/committee meetings as required. Provide annual updates of chapter info to ALA, prepare and run orientation meeting for new board members in June, maintain MLA's website and Facebook page.</p>	E <input type="checkbox"/> M <input type="checkbox"/> NI <input type="checkbox"/> D <input type="checkbox"/>	

	<p><b>Financial Management:</b> Work in regular communication and consultation with the MLA Treasurer to ensure business of MLA is conducted in a legal, timely, efficient, transparent and honorable manner. Collect, deposit, and account for all funds in a timely manner. Prepare invoices, checks, financial reports, and documentation for annual audit. Maintain the financial records, legal incorporation papers, insurance records, and other documentation of the association. Work with the Administrative Board to plan and prepare the annual budget.</p>	<p>E <input type="checkbox"/>  M <input type="checkbox"/>  NI <input type="checkbox"/>  D <input type="checkbox"/></p>	
	<p><b>Annual Conference Support:</b> Attend Conference Committee meetings and ensure that schedule is maintained, deadlines are met, and work is accomplished. Work with committee on site selection, meal selection, and creation &amp; distribution of all conference materials. Negotiate all meeting site and supplier contracts. Manage all arrangements and business dealings with exhibitors and oversee the Exhibitor Liaison. Receive and process all conference registrations and meal tickets. Produce all badges, meal tickets and signage. Respond promptly to all inquiries from attendees and exhibitors. Act as on-site coordinator during the conference. Assign and train volunteers for registration desk. Prepare final attendance numbers and financials for Executive Board and Conference Committee after the conference.</p>	<p>E <input type="checkbox"/>  M <input type="checkbox"/>  NI <input type="checkbox"/>  D <input type="checkbox"/></p>	
Total 100%		Overall performance rating	

## Strengths


## Development Action Plan

Outline the major components of a developmental plan. This plan could include courses, seminars, project work, etc...

1. Goal/Need:

\_\_\_\_\_

Action planned:

To be completed by:

2. Goal/Need:

\_\_\_\_\_

Action planned:

To be completed by:

3. Goal/Need:

\_\_\_\_\_

Action planned:

To be completed by:

**Admin Board Comments**

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**Employee Comments**

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Date:	MLA Signature:
Date:	* Employee Signature:

*\* The signature only reflects the employee has reviewed the form, if they disagree with the rating, they should complete the Employee Comments Section reflecting the points of disagreement.*