

CES - ADMINISTRATIVE SERVICE STANDARDS

Membership Management	Service Standard	Monitoring/Reporting Strategy
Makes office services available from 8:30am to 4:30pm Monday to Friday EST and evenings or weekends as required	Office hours are 8:30am - 4:30pm EST Monday to Friday and weekends as required and preapproved	Passive monitoring only (e.g., through complaints)
<p>Responds to daily telephone, mail and email requests from members</p> <ul style="list-style-type: none"> ▪ Ensures bilingual communication is available at all times; avails translation services and consults with the Executive Director ▪ Redirects complex queries to relevant CES Executive Board Member or Executive Director 	<p>Phone calls are returned within 1 business day in the language of the member's choice</p> <p>Emails and mail are responded to within 1 business day in the language of the member's choice</p> <p>Tracks incoming queries by email, phone using a customer management (ticketing) system to monitor progress and standardize replies.</p>	<p>Ticketing/Query monitoring and reporting system (to be developed)</p> <p>Quarterly reporting (monthly for the first quarter)</p>
Maintains "Frequently asked questions" for the CES website	Updates FAQ monthly with Executive Director or Board guidance	Annual reporting
<p>Records, processes, controls and monitors new and renewing members' records:</p> <ul style="list-style-type: none"> ▪ Processes new memberships from Chapters and online and ensures database is up-to-date ▪ Processes new and renewing memberships that are by credit card, PayPal, or cheque 	<ul style="list-style-type: none"> ▪ Within 2 days of receiving list ▪ Within 2 days of receiving payment 	<p>Quarterly report</p> <p>% of new membership treated within 2 days (including financial and database requirements)</p>

<ul style="list-style-type: none"> ▪ System generated messages begins two months in advance, one month in advance and one month after membership expiry date ▪ Ensures automated messaging for membership renewals (3 reminders) is up-to-date and accurate ▪ Communicates with delinquent members by email or phone; redirects sensitive issues to the Executive Director 	<ul style="list-style-type: none"> ▪ Automated ▪ Quarterly with Executive Director ▪ Within 1 month of expiry 	Quarterly reporting
Prepares membership lists monthly for Chapters; reconciled with data on payments received	Chapter membership lists are provided to Chapter presidents by the 10 th of every month for the previous month.	Passive monitoring
Prepares full membership report for Board of Directors in advance of fall meetings and for Annual Report/AGM	Report is provided 30 days prior to the meeting(s).	Annual reporting
CES Administration	Service Standard	
<p>Conducts electronic and paper filing and backups of data</p> <ul style="list-style-type: none"> ▪ Financial reports uploaded to CES Cloud 	<p>Backups are done daily</p> <p>Monthly, quarterly and annually</p>	Passive monitoring
Reviews and advises on occasional service contracts and agreements (eg. hotel; event planner etc)	Within one week of receipt from CES Executive	Board member survey (annual)

Annual Conference	Service Standard	
<p>Prepares service certificates and plaques for presentation to members as applicable</p> <ul style="list-style-type: none"> ▪ Designs certificates, prints and ensures framing is completed ▪ Prepares certificates for outgoing Board members and CES Awards 	<ul style="list-style-type: none"> ▪ 1 month prior to conference start date mock ups are sent to Executive Director and President for proofing ▪ Ensures plaques and awards are sent via courier on the Friday before the conference starts or mails to recipient 	Passive monitoring
<p>Manages conference registration and provides reports as required</p> <ul style="list-style-type: none"> ▪ Makes available a custom registration form in English and in French – available online to CES members via the CES Member dashboard as well as a fillable PDF version (for non-member or special cases) ▪ Processes conference registrations and maintains the database ▪ Manages discount codes on the conference registration form to facilitate complimentary and discounted registrations ▪ Records information on all workshops individuals choose to attend ▪ Provides weekly registration reports to the conference committee ▪ Provides daily registration reports to the conference committee the week prior to the conference 	<ul style="list-style-type: none"> ▪ 6 months prior to Conference ▪ Biweekly ▪ Biweekly ▪ Automated ▪ Monthly up to one month before the conference, then weekly ▪ 4:30 pm EST daily 	
Board Meetings (face to face)	Service Standard	
Receives quotes from hotels for meeting space		

<p>and guest rooms and makes recommendation to Executive Director and President</p> <ul style="list-style-type: none"> negotiates contract w/Treasurer, President, ED instructions 	3 months prior to date of meeting	Passive reporting
<p>Arranges hotel accommodation and meeting room logistics for Board and ED:</p> <ul style="list-style-type: none"> Emails board members asking for room requirements and food restrictions Orders AV and F&B based on final numbers and upon approval of Executive Director Receives, reviews all travel claims, ensuring approval from Treasurer or President and submits to finance for processing Receives and reviews all invoices from hotel reconciling expenditures, ensuring approval from Treasurer or President and submits to finance for processing 	<ul style="list-style-type: none"> 2 months prior to date of meeting 1 month prior to date of meeting 1 month following the meeting 1 month following the meeting 	<p>Passive reporting</p> <p>Passive reporting</p> <p>Board members survey</p> <p>Passive reporting</p>
Professional Learning	Service Standard	
<p>Issues CES Certificates of Completion for CES training within one month of receiving names and mailing addresses from Chapters</p> <ul style="list-style-type: none"> Creates, prints and mails out certificates for each workshop participant 	<p>Certificates are produced and mailed within 1 month after receiving names and mailing address from Chapters.</p> <p>Ensures spelling, workshop title and dates are correct</p>	<p>Quarterly Reporting</p> <p>Number of certificates issued within 30 days</p>
Webinars (Professional Learning Committee)		
<p>Schedules, moderates and transfers recordings of online Webinars (GoToWebinar) [10-12 per year]</p> <ul style="list-style-type: none"> Coordinates with Professional Learning 	<p>Webinars are scheduled within 2 business days of receiving the request</p> <ul style="list-style-type: none"> Schedules dry run with PLC member, ED and presenter one week prior to 	Annual report

<p>Committee (PLC) member and Executive Director</p> <ul style="list-style-type: none"> ▪ Coordinates the translation of announcement ▪ Coordinates posting announcements to CES website for Webmaster, including speaker photo, bio, learning summary [note: quality of content is PLC responsibility] ▪ Verifies CES membership of webinar attendee ▪ Provides survey reports to presenter and PLC following webinar ▪ Downloads recording of webinar and forwards to the webmaster for posting ▪ Transfers download to VIMEO 	<p>the live webinar</p> <ul style="list-style-type: none"> ▪ Request for translation is submitted to translator within 2 days of receiving the request ▪ Submits translated announcement to webmaster upon receipt of translated material ▪ 7 days prior to webinar & day of webinar, prior to its commencement ▪ 1 day following webinar ▪ 1 day following webinar ▪ 3 days following webinar 	
CES Mentoring Initiative		
<p>Secretariat and Project Lead verify weekly if any requests for CES Registration codes have been submitted.</p> <ul style="list-style-type: none"> ▪ CES Members are sent code ▪ Non-Members are invited to join 	<ul style="list-style-type: none"> ▪ Respond within 1 week 	<p>Quarterly report (Number of registrations, # CE) PLC participant feedback survey in 2017</p>
PDP		
<p>Receiving and processing online applications using a secure online platform owned by CES</p> <ul style="list-style-type: none"> ▪ The secretariat will confirm active CES membership status of applicants as a requirement for eligibility to apply 	<ul style="list-style-type: none"> ▪ Upon receipt of application 	<p>Monthly reporting</p>

<ul style="list-style-type: none"> ▪ Invoices will be issued for payment in a timely manner ▪ New applications are assigned reviewers ▪ Unsuccessful candidates will be told how to re-apply in accordance with PDP requirements, and in consultation with the CES Vice President as required ▪ Letters of congratulations from Vice President and certificates will be provided to successful applicant via email ▪ Annual status reports on CE Maintenance and renewals 	<ul style="list-style-type: none"> ▪ Within 2 days of receipt of application ▪ Within 2 days of receipt of application ▪ Within 2 days of review by reviewer ▪ Within 5 days of approval by reviewer ▪ Automated to send on anniversary date of CE award 	
<p>Prepares statistical reports for VP</p> <ul style="list-style-type: none"> ▪ Monthly summary of # applications by status (new, pending, approved, declined, appealed), location/Chapter and processing times ▪ End of year report on overall trends 	<ul style="list-style-type: none"> ▪ By the 10th of every month for the previous month ▪ On request, prior to AGM 	Passive reporting
Online Training E-Institute	Service Standard	
<p>(to be developed jointly; roles and responsibilities are still being clarified by PLC ... what we know for sure is that there will be payments out (to Velsoft; to Chapters) and received (by participants); registrar function is not yet clear)</p>		

Lynn Burgess / Megram Director Client Services – Final draft September 1, 2016

Simon Roy/CES Treasurer and Rebecca Mellett/CES Executive Director – added monitoring/reporting strategy Sept 12, 2016