



SCOPE OF SERVICES

2021 CONTRACT

APA CALIFORNIA ASSOCIATION MANAGEMENT, PUBLIC
INFORMATION, & CONFERENCE SERVICES

ATEGO RESOURCES

ATEGO Resources is contracted with APA California to provide the following services to the Chapter.

ASSOCIATION MANAGEMENT SERVICES: Executive Director and Board:

1. Respond to Chapter and Section Board member phone and e-mail inquiries.
2. Provide office and staff services to Board members as needed.
3. Coordinate Board member & staff use of administrative software, including but not limited to software that enables meetings, calendars, communication, file storage, form submission, surveys, and newsletters.
4. Order supplies as needed.
5. Coordinate with insurance provider and assist Sections in obtaining general liability insurance for local event facility locations.
6. Coordinate elections materials and send them to APA National to include in the national ballot.

WEBMASTER SERVICES: Executive Director / VP for Public Information

1. Work with the website contractor to update the Chapter's website, including integrated tools and applications such as aMember, MailChimp, etc.
2. Provide member and Board assistance with log-in issues, elections and conference registration.
3. On website homepage, maintain rotating slideshow images, content and links; update Sponsor logos and links on ticker.
4. Proactively and independently maintain main page, all subpages, all hyperlinks, and all text content with accurate and up-to-date information based on Executive Board and Full Board meeting minutes, discussions with individual Board and Section Board members, and timely review of relevant information sources.
5. Review Section and Affiliate newsletters/websites for events and information of interest to a statewide audience, add them to the website, and submit them via the newsletter submittal form.
6. Update Board Binder and/or new online Board file storage system with new documents and information in coordination with the Executive Director.

NEWSLETTER SERVICES: Executive Director / VP for Public Information

1. Maintain online submittal form for announcements to be included in the e-newsletter and provide all submitted content to GranDesigns for formatting.
2. Direct e-mail or verbal submissions of newsletter content to submit via the online form.

3. Work with GranDesigns and VP for Public Information to coordinate review of e-newsletters prior to distribution.
4. Distribute bi-weekly e-newsletters from the Board and Conference to members via MailChimp.
5. Distribute special newsletters including CalPlanner editions; conference information; legislative alerts; and other items as requested.

SOCIAL MEDIA SERVICES: Executive Director / VP for Public Information

1. Maintain social media accounts for the Chapter including, but not limited to, Facebook, LinkedIn, Twitter, and Instagram.
2. Monitor the Chapter's social media accounts on a daily basis for requests to follow/join, and approve them.
3. Monitor social media platforms on a daily basis for comments, questions, requests or mentions (tags/@s) that need staff or Board member attention. Respond as appropriate, and/or flag items for attention by the appropriate staff or Board member.
4. Post regularly on the above-mentioned social media accounts to share information submitted for the e-newsletter, Board business updates, conference information, and other items of interest to APA California stakeholders.

CONFERENCE SERVICES:

CONFERENCE - GENERAL, SPONSOR, WEBSITE, MOBILE APP AND REGISTRATION SERVICES

ATEGO Resources is contracted to provide administration and oversight of the conference registration, website, mobile app, and related services, and provide on-site and post-conference support to the Conference Manager, VP for Conferences, Conference Program Coordinator, and the Conference Host Committee as described below:

CONFERENCE ADMINISTRATIVE SERVICES

1. Pre-Conference
 - a. General
 - i. Respond to emails and phone inquiries from Conference Manager, VP for Conferences, Conference Host Committee (CHC), Sponsors, vendors and conference contractors
 - ii. Participate in monthly conference calls with VP for Conferences, Conference Program Coordinator, and Conference Host Committee.
 - iii. Coordinate with the VP for Conferences to compose and send out emails through the registration portal to the membership and potential and registered conference attendees on the conference program, registration, sponsorships, and other conference information.
 - iv. Obtain required conference insurance, including catastrophic insurance, and general liability insurance for facility/mobile workshop locations.
 - v. Coordinate with session moderators to obtain copies of session presentations for post-conference posting on Chapter website.
 1. Create Dropbox or Google Drive folder for conference.
 2. E-blast session moderators with upload information. Assist moderators with uploads, if necessary.
 - vi. Obtain conference logo and color palette from graphic design contractor for incorporation into the conference registration, website, and mobile app.
 - b. Registration
 - i. Set up conference registration and coordinate online registration pages with registration provider (Cvent) to ensure alignment with registration details and forms.
 - ii. Provide discount complimentary registration codes to Executive Board, CHC, CPR registration sponsorships, press, and invited guests.

- iii. Coordinate with Conference Manager on exhibitors that have a conference registration included with their sponsorship package, provide registration instructions and discount code to exhibitors, and ensure each has registered by the deadline.
- iv. Coordinate the optional electronic registration form with graphic design contractor and incorporate into registration portal and conference website.
- v. Enter registrations for those who mailed or emailed a registration form.
- vi. Coordinate with Cvent on Attendee Support Services during the pre-conference period on registration inquiries and technical issues.
- vii. Coordinate with Cvent to implement registration enhancements and customizations as needed.
- viii. Provide registration reports for monthly CHC call and upon request from VP for Conferences and Conference Manager.
- ix. Respond to emails and phone inquiries regarding registrations.

c. Conference Website and Mobile App

- i. Set up the conference website (homepage and sub-pages) and mobile app and serve as lead liaison with website and app provider (Cvent).
 - 1. Coordinate with VP for Conferences on design, organization, and content.
 - 2. Coordinate with graphic design contractor for graphics assistance on the website and app.
 - 3. Create links to Chapter's website.
- ii. Work with Cvent to implement website and app enhancements and customizations as desired.
- iii. Coordinate with VP for Conferences, Conference Program Coordinator, Conference Co-Chairs, and contractors to upload conference content on the website and app, including but not limited to: general information, registration, special events, program schedule, session and mobile workshop descriptions, speaker biographies, sponsor logos and ads, and instructions to speakers, attendees, students, volunteers, and sponsors.
- iv. Enter conference updates when available and ensure information on the website and app is consistent.
- v. Post conference announcements, session changes/cancellations, and reminder messages on the app before and during the conference as directed.
- vi. Post links to recorded sessions on the app as they become available.
- vii. Create and post surveys and polls on the app as directed.

2. On-site

a. General Duties

- i. Arrive and review registration set-up and test use with Conference Manager one day before conference commences.
- ii. Coordinate volunteer schedule and breaks with Volunteer Chairperson. Instruct registration volunteer lead on expected workflow and procedures.
- iii. Refer technical needs to Conference Manager or A/V provider.
- iv. Ensure exhibitors have booth/table passes for staff as described in the sponsor/exhibitor Benefit Matrix.
- v. Provide sponsor/exhibitor with sponsored event passes as described in the sponsor/exhibitor Benefit Matrix.
- vi. Assist VP for Conferences and Conference Manager with tasks upon request.
- vii. Provide registration lists for mobile workshops to Mobile Workshop Co-Chair/Conference Manager.
- viii. Respond to onsite attendee questions.

b. Registration Duties

- i. Process onsite registrations as needed.
- ii. Oversee registration support staff.

- iii. Troubleshoot onsite registration problems/questions.
- iv. Coordinate with registration provider on setup and administration of OnArrival 360.
- v. Assist with registration closure and packaging of conference materials.

3. Post-Conference

- a. General
 - i. Respond to emails and phone inquiries.
 - ii. Provide V.P. of Conferences, Conference Manager and CHC with end of conference registration reports.
- b. Collect PowerPoint presentations from session organizers.
 - i. Create, hyperlink and maintain the session PowerPoint presentation page on the Chapter website.
 - ii. Create content table to replicate the At-a-Glance format.
 - iii. Hyperlink session material(s) submitted to PowerPoint in Dropbox.
 - iv. Assist members in logging in to view presentation page.
 - v. Assist non-member attendees to view a specific number of presentations as described in policy.
- c. Coordinate with VP for Conferences to prepare and distribute the post-conference survey.
 - i. Post survey on mobile app.
 - ii. Send out survey and reminders to conference attendees through the registration portal.
 - iii. Provide survey results to VP for Conferences.
- d. Participate in post-conference debriefing and assist VP for Conferences with updates to Conference Planning Handbook as requested.
- e. Assist Distance Learning Coordinator in organizing and uploading recorded sessions in the conference mobile app and on the Chapter's website.