

Tliffe SITE ADMIN Responsibilities – 2020		Tliffe Admins					2020 Club Volume (as of 1/1/2020) (Approx workload is noted in columns below - Grey is N/A)			
As of 11/25/2019	Role:	VP Tliffe Business**	VP Tliffe Technology	Data Base Mgt		Club Support	Platinum (Admins)	Gold	Silver	Bronze
Function	Function Description	Marsha Herzog, ASA	Adrian Kasper, ASA	Judy Gibbons	Open	John Manczko & Roberta Kasper	4 (HOA, POA, TVCUC, NV)	2 (Players, Comm Church)	20	15

### DataBase Management

Ongoing Database Management	Monitor info@tellicolife.org	Backup	HOA ?s	Primary			Annual Memberships; New Tliffe Profiles, NV	N/A	N/A	N/A
On Request Projects	Profile exports, data clean up, special proj		Prospects	Primary			2 to 4 times/year	N/A	N/A	N/A
Data base Setup for New Clubs/New Attributes	Custom Attributes	Backup	Primary				Annual Membership forms; New Plat Club	N/A	N/A	N/A
Access, Permissions & Security	Attribute permissions, profile owner, etc	Backup	Primary				New fields or if a new group is needed	N/A	N/A	N/A
Moolah start up for new PLAT Clubs	Moolah set up and start up	Primary	Backup				Coach & Train Club Finance	N/A	N/A	N/A

### Tliffe Web Content Management (Not Plat Club Specific)

Manage Tliffe Home page, TL Articles & GSB Home pages	Keep home page fresh; esMange GSB Club Home page					Primary	N/A	Club provide content; Set up home pages with expectation it changes once or twice a year		
Manage Admin Help Articles	Plat clubs self manage their Help Articles					Primary	N/A	N/A	N/A	N/A
Manage Menu Structure	Tliffe Menus (Blue bar)					Primary	N/A	N/A	N/A	N/A
Manage Sponsors	Set each Club as a sponsor					Primary	Add when new club is added			

### Tliffe Forms (PLAT Clubs manage their own forms for events, etc)

Tliffe Forms	Ex. Contact Us, Tliffe Membership	Backup	Primary				N/A	N/A	N/A	N/A
Annual Club Subscription Form (Participation)	Manage the form that is How new clubs register and pay for Tliffe	Backup	Primary				N/A	N/A	N/A	N/A
Annual Subscription Invoicing	Invoice participating clubs in December	Primary					Annual Invoice Emailed; Checks to Library; HOA Membership posts; Tliffe Chases			
Club Membership Forms	Tliffe admins manage for PLAT Clubs because of DB Fields	Backup	Primary				HOA, TVCUC changes once/year in Oct	N/A	N/A	N/A
Invoice Template	For Tliffe & Plat Clubs	Backup	Primary				Rarely changes	N/A	N/A	N/A

### Tliffe Community

Manage Calendar Entries	GS ONLY (Counts are per year)					Primary	N/A - See Club Admin	Up to 48	Up to 24	N/A
E-Lists Set UP	Contact Us, Tliffe Membership.					Primary	Available if needed; Set up with New Club; User maintained thereafter			
@tellicolife.org email administration	ASA Settings> Email Admin	Backup	Primary				One time set up when E-List is created			
Populate Elists with Member Names		Backup	Primary				Available if needed; Import excel spread sheet			
Circles Set Up	Circle membership is always user maintained					Primary	Available if needed; Set up with New Club; User maintained thereafter			
Blog Set Up	Blog is currently set up LRP Onky, may find other uses	Backup	Primary				LRP Committee Only	N/A	N/A	N/A
Directory Set Up	Manage set up and permissions	Backup	Primary				Add/Remove Annual Membership Fields	N/A	N/A	N/A

### Support for Members and Clubs

General Membership questions	info@tellicolife.org: signon issues mostly	Backup	Backup	Primary		Backup	Member driven, Club specific questions are forwarded to the club			
Club ADMIN Technical Support	How to ; it doesn't work questions									
Monitor/Audit Club Usage	Oversee how / what is going on	Primary	Backup				By the Admin Team	N/A	N/A	N/A
Club ADMIN Training	Plus Club Admins									
Tliffe ADMIN Group Leadership	All Clubs ADMINs Meet Monthly	Oversee					Rotate each month	N/A	N/A	N/A
Tliffe Steering Team Leadership	Issues, next steps, strategic direction (Quarterly)	Primary	Backup				Represent Club	N/A	N/A	N/A
Tliffe Board Leadership	Policy (2x/year + as needed)	Primary	Optional				Represent Club	N/A	N/A	N/A
POA On Boarding & Support	Start Jan 2020	Primary	Primary				Identify POA Team	N/A	N/A	N/A

### TellicoLife Permissions

** Marsha is manages the overall program and markets to new clubs ASA: Authorized Service Administrator	Admin ("Back End") Site Permissions	ASA, Admin	ASA, Admin	ASA, ADMIN		Club Admin	Club Admin	N/A	N/A	N/A
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**HOA TellicoLife & HOA Web Site Responsibilities**

As of 11/11/2019		Technology*		Social			Finance	Membership	Comms
	Role:	VP Tech	HOA Webmaster	VP Social	HOA Admins	Event Coordinators	VP Finance	VP Mem	VP Comms
Function	Description	Marsha Herzog	KC Babb	Jack McElliot & Steve Turkowitz	Adrian & Roberta Kasper	Various	Linda Klein	Penny Manczko	George Curran
<b>Marketing &amp; Communications (Articles)</b>									
Provide Post-ready Content	Typically PDF or Word			Social Content				Membership	General HOA
Post /Update TellicoLife	Manage Articles; Elists;		Primary		Events				
Post/Update HOA Website	Post Communications		Primary						
Post/Update Social Media	Post Pictures, etc (Facebook/Twitter, etc)								Primary
<b>E-Mail Broadcasts (Contact Center)</b>									
Provide Email-ready Content	Word preferred			Social Content				Membership	General HOA
Broadcast through Contact Center			Primary		Backup				
Manage Bouncebacks	Webmaster exports to Membership		Export					Chase Members	
<b>Social Events (Event Management)</b>									
Provide Post-ready Calendar Entries	See Template Instructions					Primary			
Post Calendar & Location Entries					Primary				
Create Forms	Event Registration and Waitlist				Primary				
Create View Registrant Links	Search, Ghost Menu, Link to Calendar				Primary				
Issue Credit Card Refunds	HOA issues refunds outside of Tlife						Via Check		
Update invoice to reflect refund	And remove from Registrant list				Primary				
Manage Registrations	Using On-line + paper sign up sheets					Primary			
Chase Checks	Very little, only if accepted by phone					Primary			
Export Registrant Lists	TO EC When Event closes				Primary				
Host Event						Primary			
Prepare Financial Event Close Out						Primary			
Reconcile Financial Event Close Out	Deposit Checks and Cash						Primary		
Archive Calendars, Forms, View Registrations	After close of event; Delete prospects after 6 months				Primary				
<b>Membership</b>									
Recruit Members	At meetings, etc.							Primary	
Provide Membership form updates	Provide Tlife Admins the any changes to the Annual Membership form by mid Sept. Tlife admins create the on-line form							Paper form	
Collect Paper Forms & Money	From Library, etc.							Primary	
"Take Form As" for Paper Membership	90+% Comes in On-line by credit card							Primary	
Deposit Checks and Cash							Primary		
CollectTlife Club Participation Checks	Club Tlife membership checks go to Library							Primary	
Chase Checks/Reconcile Balance Due	Rare, if sign up online and choose check							Primary	
Report Membership Statistics	On Request from Membership								Dir Search/Sub List
<b>Finance</b>									
Reconcile Ccard Payments	Between Moolah and Bank						Primary		
<b>TellicoLife Permissions</b>									
	Admin ("Back End" ) Site Permissions		CLUB ADMIN	NA	CLUB ADMIN	NA	CLUB ADMIN	CLUB ADMIN	NA

**NV TellicoLife & NV Web Site Responsibilities**

As of 11/11/2019										
			Activities			President	Finance	Membership	Communications	
	Role:	NV Admin	VP & Assoc Social	EVENT COORD	Club Leads	President	VP Finance	VP Mem; & Mem Admin	WebMaster	VP Comms
Function	Description	Linda Briede Tierney Stetson	Karen Halligan; Linda Rasmussen	Various	Various	Mike Blackwell	Mark McMahan	Nancy Mariani; Marilyn Gengo	Linda Garza	John Schelldorf
<b>Marketing &amp; Communications (Articles)</b>										
Provide Post-ready Content	Typically PDF or Word		Social Content		Club Content	NV General		Membership		NV General
Post/Update TellicoLife	Manage Articles	Club Related								
Post/Update NV Website	Post Communications		LindaR						Primary	Primary
<b>E-Mail Broadcasts - Newsletters, etc (Contact Center)</b>										
Provide Email-ready Content	Word Preferred		Social Content	Event Content	Club Content	NV General		Membership		NV General
Broadcast through Contact Center									Backup	Primary
Manage Bouncebacks										Primary
<b>Activities/Social Events (Event Management)</b>										
Provide Post-ready Calendar Entries	See Template Instructions**			Event Content	Club Content					
Post Calendar & Location Entries		Primary								
Create Forms	Event Registration	Primary								
Create View Registrant Links	Search, Ghost Menu, Link to Calendar	Primary								
Issue Credit Card Refunds		Primary								
Manage Registrations	Using paper sign up sheets			Events	Club Events					
Chase Checks				Events	Club Events					
Export Registrant Lists	On Request from EC	Primary	Front End onLine							
Host Event				Events	Club Events					
Prepare Financial Event Close Out				Events	Club Events					
Reconcile Financial Event Close Out	Deposit Checks and Cash						Primary			
Archive Calendars & Forms, Disable View Registration Lists	After close of event	Primary								
<b>Membership</b>										
Recruit Members	At meetings, etc.							Primary		
Provide post-ready changes for forms	E.g. who is from							Primary		
Manage Membership Form	Tliffe will create the form, Current form is not annual							Paper		
Collect Paper Forms & Money	At meetings, etc.							Primary		
"Take Form As" for Paper Membership	Encourage On-line Registration; Includes Recording Payments							Mem Admin		
Complete Linked profiles for new NV's	Tliffe Admins do this from bcc of membership form									
Deposit Checks and Cash							Primary			
Report Membership Statistics	On Request from Membership							Primary		
Graduate members monthly	Tliffe Admins will send list to Memberclicks for action									
<b>Other (e.g. Golf, Muddy Boots, etc.)</b>										
For NV Golf manage E-list subscriptions	Send Tliffe Admins annual list; Then members self sign up	Backup if Member doesn't sign up								
Provide post-ready changes for forms	e.g., signed by					Primary				
Manage sign-up forms						Paper				
<b>Finance</b>										
Reconcile Ccard Payments	Between Moolah and Bank						Primary			
<b>TellicoLife Permissions</b>										
Per John Manczko, we are assuming Golf transitions to Chelsea for 2020		Admin ("Back End" ) Site Permissions	CLUB ADMIN	NA	NA	NA	NA	CLUB ADMIN	CLUB ADMIN	CLUB ADMIN

Column1	Column2	Column3	Column4	Column5	Column6	Column7	Column8	Column9	Column10	Column11	Column12
	Admin		FLS Membership Search		General Membership Search		Financial Search		Mac SIG		Flash Messages
Ken Van Swearingen	X		X		X		X		X		X
Linda Bailey	X				X						X
Tom Verbeke			X								
Lou Miller			X								
Bob Mugge			X								
Bill Cummings			X								
Gary Robertson			X		X						
Mike Casey			X								
Dave Crowden			X		X						
Jim Autry					X						
Jim Watson					X		X				X
Lisa Kaufman											
Karen Brown									X		
Vince Alline					X						