

American Institute of Constructors

Constructor Certification Commission Policy and Procedure No. 5.3

Commission Contractor Responsibilities and their Employee Job Descriptions

10. Maintain a good working relationship with the Commission and the examination sites including responding to their inquiries and needs in their coordination of the semi-annual CAC and CPC examinations.

Administration

1. Provide a dedicated phone line for the Commission with a live knowledgeable person to answer during normal office hours, 8:00 am to 5:00 pm ET, Monday through Friday. Provide an answering service to take messages during other times and respond to those messages during the next business day.
2. Plan and organize logistics for the Commission and its various committees, subcommittees, panels and task forces as they might arise.
3. Work with the Commission Chair to develop agenda for the Commission meetings and telephone/web conferences. Notify all parties of the time and location of the meetings and telephone/web conferences in a timely manner. Plan and organize the logistics for other committee meetings in coordination with their Chairs.
4. Maintain records and files in a form as directed by the Commission. Current files containing information on all certified individuals must be maintained on the premises.
5. Manage in an orderly fashion and store the Commission's historical and archived files and records in an appropriate secured easily accessible storage facility.
6. Maintain ability to and accept and reply to all correspondence directed to the Commission including written, telephonic, fax, web site or e-mail format. Prepare and send letters from the Commission as directed by its Chair.
7. Record, prepare and distribute agendas and minutes of the Commission meetings and telephone conferences.
8. Administer the semi-annual testing process in conjunction as described below.

Financial Management

1. Develop and recommend to the Commission financial policies and procedures.
2. Under the direction of with the Commission's Treasurer, develop an annual budget for the Commission for approval by the Finance Committee.
3. Review compliance with nonprofit and corporate governance rules and make recommendations for change if needed.
4. Implement annual budgets, including making recommendations for necessary adjustments to the Commission's Board of Governors.
5. Maintain all financial records in accordance with GAAP using a file format that is universal, ubiquitous and approved by the Commission's Board of Governors. Produce the following monthly statements and distribute to the Commission's Board of Governors by the 20th of the subsequent month:
 - a. Statement of Financial Position (Balance Sheet)

- g. Cash receipts journal with name, amount and date of payee
 - h. Check Register Report
 - i. 12-Month Annual Actual vs. Forecast Report
6. Maintain and manage a banking relationship, requiring two signatures on accounts i.e. Commission Chair and Certification Manager, Commission Treasurer and Certification Manager or Commission Chair and Treasurer.
 7. Invoice annually for Continuing Professional Development (CPD) fees.
 8. Collect and process testing fees and properly account for payables.
 9. Invoice, collect fees for, and mail the Strength and Weakness reports to the Universities.
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numbers to anyone who does not have complete information confirming education and experience in our file.

3. Send copies of items received for those selected for a physical audit to the Commission's Continuing Professional Development Audit Subcommittee's members. Maintain a record of which records were sent to which committee member and the date sent and received back by the Commission's Certification Manager.
4. Send follow-up letters as directed by the Commission's Continuing Professional Development Audit Subcommittee to those that have not responded. Send letters to those that did not pass the audit advising them what they need to do to pass and the time frame in which they have to complete the process.
5. Send letters to those that passed including new Continuing Professional Development information and a new wallet card if they are also up to date with their maintenance fees. Provide a list to the Commission of those passing, not passing, and those that did not respond.

Executive Director - The ED is active in the review and management of all Commission's activities and manages the day-to-day aspects of ED internal operations. The ED Representative oversees the ED staff, monitors workload, ensures that the internal back-office work flows seamlessly and monitors the financial activities of the Commission. The ED Representative is responsible for maintaining Commission relationships and ensuring satisfaction. Responsibilities include, but not limited to:

Financial

1. Assists in the preparation of and monitors annual budget
2. Coordinates tax preparation in a timely manner
3. Reviews deposit and invoice coding prior to bookkeeper pickup
4. Reviews monthly financial statements and monitors their status
5. Researches discrepancies in reports
6. Monitors financials for compliance with accepted financial reporting standards
7. Maintain and review Accounts Payable and report to the Commission any past due receivables on a regular basis.
8. Forwards financial reports to Commission Treasurer
9. Coordinates Commission audits

Human Resources

1. Conducts staff meetings
2. Takes internal disciplinary actions when needed
3. Manages evaluation process
4. Evaluates employees and others as appropriate
5. Conducts internal training

Client Relations

1. Periodically attends Commission meetings
2. Participates in strategic planning/brainstorm new initiatives
3. Facilitates Commission evaluations of the Management Contractor

4. Serves as liaison with Commission and addresses any issues with AMC services/performance
5. Conducts periodic policy reviews
6. Signs contracts and checks on behalf of the Commission with written approval by Commission

Certification Manager - The Certification Manager reports to the ED and has primary oversight responsibility for Commission activities. General duties will include management of the daily activities for the Commission, including certificant database and fulfillment, Commission relations, marketing/communications, meeting and event management, budgeting/financial concerns, and general Commission leadership.

The Certification Manager will manage the day-to-day direction and implementation of Commission's contract. The Certification Manager serves as the primary point of contact and is responsible for all operational functions including Commission liaison to the certificants, communications, and event staff, coordinating association finances with the bookkeeper, and managing outside vendors. The Certification Manager has the ultimate responsibility of ensuring that client tasks are completed properly and on time. 2h7 (tvdp)7aon (p)dr3m (o)2 (t)-2 (e)-131 (t)3 oson (p)drn

6. Assists in the design and implementation of Commission policies and governance materials,
7. Assists in the development of Commission meeting agendas
8. Prepares and distributes Commission meeting notices; Distributes meeting agendas, proxies, financial reports, and all post-meeting minutes, reports, and materials
9. Monitors attendance at Commission meetings
10. Reports to Commission on a regular basis on activities and benchmarks
11. Periodically reviews scope of services

Financial

1. Properly codes incoming invoices from vendors
2. Provides information to bookkeeper to generate accurate financial data
3. Forwards financial reports to the Commission Treasurer
4. Tracks assets and liabilities
5. Manages banking relationships
6. Monitor and review Accounts Payable and report to Commission any past due receivables on a regular basis.

Communications

1. Monitors/responds to Commission email; forwards relevant emails for follow up
2. Oversees development of all communications
3. Becomes resource and liaison for industry reporters

Certificationship

1. Works with the Commission to build certification numbers and other key indicators
2. Works with appropriate Commission committees to enforce admittance and maintenance requirements.

Events/Programs

1. In conjunction with the Commission:
 - a Develops and monitors event budgets
 - b Develops and monitors event timelines
2. Develops & maintains a master calendar of events for the Commission
3. Attends programs: liaison with presenters, Commission, and other attendees.

Administrative Assistant (AA) - The Administrative Assistant manages the customer service aspects of the Commission operations. They are responsible for the administrative functions regarding certification and testing, programs, fundraising, communications, and events. The Administrative Assistant reports to the Certification Manager for each client and works to ensure that assigned tasks are completed properly and on time.

The responsibilities of the Administrative Assistant include but not limited to the following:

General

1. Answers phones
2. Maintains organized filing system
3. Effectively communicates project status with others
4. Completes special projects as assigned
5. Assist in Test Management duties as needed as listed under Certification Manager responsibilities

Administrative

1. Maintains organization of Commission filing system (email and hard copy)
2. Attends Commission meetings, as needed

Communications

1. Monitors/responds to Commission mail and email; forwards relevant communications for follow up
2. Provides customer service to certificants via phone and email
3. Supports outreach to certificants via email updates and newsletters

Financial

1. Responds to requests for taxpayer ID numbers
2. Prepares check deposit and credit card reports

Certificants

1. Responds to certificant inquiries
2. Works with Account Director to build certificant base increase prospects
3. Coordinates special Commission programs, mentor programs, career days, sponsor appreciation, recruitment campaigns, etc. Serves as liaison with Commission Committee chairs and others.

Events - In conjunction with client/Account Director/Event Director:

1. Develops and monitors event timelines
2. Attends programs: liaison with speaker, Commission, and certificants
3. Assists in coordinating logistics associated with Commission meetings/retreats

Event Director (EvD) - The Evd(T)t baitertificants

The responsibilities of the Event Director include but not limited to the following:

Administrative - In conjunction with Certification Manager.

1. Develops and monitors event budget
2. Develops and monitors event timeline
3. Maintains materials/supplies needed for event
4. Attends Commission meetings as needed
5. Coordinates and manages onsite volunteers
6. Maintains event binders for all major events

Venues

1. Site selection and management, including contract negotiation
2. Menu planning, BEO review and approval
3. Provides room set up and other needs
4. Provides final counts

Registration

1. Responds to registration inquiries via phone, fax and email
2. Invoices attendees as necessary
3. Sends registration confirmations/reminders
4. Prepares name badges and recognition ribbons
5. Manages onsite registration
6. Generates post-event attendance reports

Programs

1. Coordinates attendee needs (travel, AV, etc.)
2. Manages AV needs, including Internet connections
3. Manages signage
4. Manages site décor
5. Manages entertainment
6. Coordinates with other vendors as necessary

Revision History:

Last Revision: 09/10/2022