



TellicoLife Lead

Purpose:

As the TellicoLife Business Lead, provide strategic direction and marketing for TellicoLife. As the Operational lead, provide operational oversight for TellicoLife. TellicoLife is operated as a standing committee under the HOA Charter. The TellicoLife Lead will provide monthly status to the HOA VP of Technology.

TellicoLife Business Lead

- Maximize the value of TellicoLife for its participating organizations, and all Tellico Village residents.
 - Work with the TellicoLife board to set and monitor the TellicoLife strategy.
 - The TellicoLife board consists of the president (or designee) from each Platinum organization.
 - The TellicoLife business lead convenes the group monthly, manages the agenda and provides meeting minutes.
 - The board focus is TellicoLife strategy and financial stability.
- Ensure TellicoLife is financially self-funded through annual contributions from participating organizations. Work with the HOA treasurer to ensure reserve funding for 1 year of TellicoLife expense' is developed.
 - Obtain annual commitments from participating organizations.
 - Invoice participating organizations each December for the following year.
 - Payments are applied by the VP Membership (because they follow the HOA Membership payment process).
 - Chase unpaid invoices.
 - Work with the HOA Treasurer to ensure Quickbooks and TellicoLife financial records agree. TellicoLife is the system of record.
 - Provide Monthly financial summary to the HOA board.
- Market TellicoLife throughout the village and to village organizations.
 - Ensure new organizations are implemented accurately, timely and within standards.
 - May personally implement organizations, or may turn over implementation to other TellicoLife Administrators.
 - Maintain contact with the leadership of participating organizations.
 - Understand why organizations don't renew TellicoLife participation and make changes to the strategy or direction if appropriate.

TellicoLife Operational Lead

- Maintain a functional knowledge of TellicoLife software, operations and standards.
- Primary contact with Personify - MemberClicks, the TellicoLife software provider, to advocate for TellicoLife needs and implement new features. (The TellicoLife Admin Lead is the secondary contact with Personify - MemberClicks)
- Oversee the TellicoLife Admin team(s), ensuring they are staffed appropriately, trained and operating effectively. This includes the team members who are performing functions relative to the TellicoLife site itself, HOA's use of TellicoLife, participating organizations that have their own TellicoLife Admins and participating organizations who are supported by TellicoLife Admins. The Admin team meets monthly.
- Coordinate with Platinum club Treasurers to ensure they are trained in the TellicoLife credit card process and able to balance the bank deposits to TellicoLife as the system of record. The treasurer team meets as needed.