

A. Using the Phone System

The Inter-Tel Phone System Manual is to be kept at the Front Desk for staff reference

a. Answering the Phone

- i. *What to say:* "Sister Cities International. This is ___name___. How may I help you?"
- ii. Ask for the caller's name (in order to introduce the person to the staff member)
- iii. *How to transfer:* Push TRANS, dial the extension, and wait for the staff person to pick up. If he/she picks up and would like to take the call, hang up the phone. This will direct the caller to the person to whom you are transferring. If he/she does not pick up or cannot take the call, go back to the caller by pushing the blinking green CALL button and tell the caller that the staff person is unavailable. Ask if he/she would like to be forwarded to the person's voicemail.
- iv. *Forward to voicemail:* Push VMS, dial the extension and hang up.
- v. *Forward the phones to another extension:* Without picking up the phone, push FWD, then dial the extension to which you'd like to forward the phones.

b. Voicemail

- i. *Check voicemail internally:*
 1. Push MSG
 2. Enter your extension number followed by the # key
 3. Push 1
- ii. *Check voicemail externally:*
 1. Dial CALL
 2. Dial 202-347-8630
 3. Dial *
 4. Dial the password for that mailbox
 5. Dial 1 to listen to new messages
- iii. If there are still new messages, repeat the steps.
- iv. Notes:
 1. If in doubt of giving out contact information, take a message, call or contact the person whose information is being requested and give them the information to call.
 2. The only phone that should be forwarded to other phones is the main line. Intern extensions should never be forwarded from other intern extensions. All forwarding must be done at the front desk.

B. Conference Calls

- a. *To schedule conference calls, follow the steps outlined below:*
 - i. Open a browser to: <https://sistercities.pgimeet.com/>
 - ii. Login.
 - iii. Click on "Schedule" under Web and Audio Meeting
 - iv. Fill in the form that pops up with the desired time/date/subject information
 - v. Enter necessary email addresses and click send.
- b. *To start conference calls, follow the steps outlined below:*



- i. Open a browser to: <https://sistercities.pgimeet.com/>
- ii. Login.
- iii. Click "START" under Web and Audio Meeting then "Start" on the next screen
- iv. To record a meeting, click the record button on the interface that pops up on your screen after clicking "START." Ensure you save the recording as an Audio recording only.

C. Phone Lists

a. Office Extensions:

Located in shared drive under *Administration -> Staff Information -> Phone Extensions*. After you update, make sure to save it as the current month and year.

b. Staff Cell Phones:

Located in shared drive under *Administration -> Staff Information -> Staff Cell Phone*. After you update, make sure to save it as the current month and year.

D. Webinar Information

a. Registration and Joining the Webinar:

- i. Click the "Registration" link within the webinar invitation emailed to you by Sister Cities International.
- ii. You will be directed to the Registration page. Fill in your contact information. You will be sent an email immediately that will allow you to join the meeting.
- iii. Once you receive the confirmation email click on "Join Webinar." This link will take you to the "Join Webinar Page." If this is your first GoToWebinar, the webinar software will automatically start downloading on your computer. If the download does not start automatically, there is a link you can click that will start the download.
- iv. You will be prompted to log into the webinar using the password provided in your invitation email from Sister Cities International. The webinar Organizer must be logged into the webinar for participants to log in.
- v. Once you are logged in, the webinar presentation will appear on the screen.

b. Enabling Audio

- i. Once the software download is complete and you are logged into the webinar, you can enable the audio components of the webinar on your computer so you can listen in.
- ii. You can enable audio by using a telephone or by using Voice Over IP (VOIP-your computer's speakers and mic). Both options will enable you to listen and speak. Use the Control Panel at the top-right part of your screen to do so.
- iii. Click on either "Telephone" or "Speakers and Mic."
- iv. If you are using your telephone, select "Telephone," then dial-in using the "Dial" number; when prompted type in the "Access Code" followed by the # sign and then the "Audio Pin" followed by the # sign.
- v. If you are using VOIP, select "Mic and Speakers" then left click on the Audio Setup option below "Mic and Speakers" to adjust your audio settings (if you use headphones you will need to specify the headphones option).
- vi. The Control Panel is also where you can type in and ask questions during the webinar and where the organizer can type their responses back.
- vii. To cut down on background noise all telephone and microphones will be muted.

- viii. You can still ask questions by typing your question into box at the bottom of the Control Panel. The Speaker will be able to view this question and will type an answer back to you in this box or voice the answer to all webinar participants.
- ix. To view the webinar in full-screen: Press the blue button.
- x. At this point your audio will be enabled and you can listen-in and view your webinar.
- xi. To exit the webinar: In the control panel, click “File” then “Leave Webinar.”

E. Opening Mail

- F. Open all mail except for payroll, letters/packages from banks, and letters/packages marked “Confidential”. Bank letters and payroll go directly to President and CEO (Executive Vice President if President and CEO is not in). Put the bank letters in a red file folder and put the envelope on President and CEO’s or Executive Vice President’s door. Date stamp all mail and put in respective staff mailboxes.

G. Mail Services

We use FedEx, DHL, USPS, UPS, and Washington Express for couriers.

Remember to type to which department the shipping charges should go. You can type that into the reference tab as you’re inputting the shipment information.

Shipping supplies are in the back closet. You can order more online if we run out.

H. Postage Meter

When the postage meter machine balance is zero, please complete the following:

- a. Ensure that the telephone line is connected to the machine
- b. Enter the PIN number as listed on the machine
- c. Confirm by pressing the TELESET key
- d. The last amount set will be displayed. To reset this amount again, press the TELESET key a second time
- e. Within one minute, your meter will be ready to run after you hear the “beep”
 - These instructions are written on the machine.

I. Emergencies

In case of a fire alarm or other emergency, please proceed to the stairwell to exit the building unless other instructions are given by the Director of Finance and Administration. When exiting the building, proceed to the statue in McPherson Square and remain there until the entire office has gathered to await further instructions.

J. Internet and Phone Issues

For any technical assistance related to the above, please contact the IT Manager (Bill Howells) at bhowells@sister-cities.org, 301-589-4060.

K. Supplies

The Executive Assistant will be responsible for maintaining an inventory of the office supplies. Supply orders will be as cost-effective as possible and meet the organizational needs in the most efficient manner. Regular supply orders will be made every alternate Tuesday beginning.

Employees are to fill out the order form location at S:/Administration/Staples in order to meet their supplies needs. If employees have special urgent supply needs, they are required to get permission from the Director of Finance and Administration before supplies are ordered or the employee can purchase the supplies.

When ordering, please note that if supplies are in stock, they arrive the next afternoon. However, if they are not available the next business day, it should arrive one day later. Therefore, if you have a project with special needs, place the order with the Executive Assistant at least one week in advance.

All orders pertaining to letterhead, envelopes with the Sister Cities International logo, and business cards should be coordinated with the External Affairs Director. Expenditures for printed materials should be reviewed by the External Affairs Director. Printed materials should conform to publication policies as defined by the Sister Cities International Branding & Style Guide.

L. Urgent Supplies

Sister Cities International has a Staples credit card and a tax-exempt certificate. To order urgent supplies, please fill out a credit card request form and get it approved by the Director of Finance and Administration. After completing the purchase, please submit the receipts along with the approved purchase request form to the Financial Program Manager. The Director of Finance and Administration is to be informed prior to purchasing the supplies if the expected amount is in excess of \$500.

M. Reserving Conference Room

To reserve the conference room on the 4th Floor, please add CRoom@sister-cities.org to the invitee list of your meetings. The Conference Room shared calendar will automatically add your meetings and show the availability of the room.

To reserve the 6th or 8th floor conference rooms, please complete the form found in:

S:/drive/External Affairs/Administrative Conference Info/Conference Room requests/8th 6th floor conference room request form.doc

N. Copier

- a. Call Capitol Office Solutions with any copier problems.

– (888) 937-4283

- They will ask for:
- Equipment ID: 75692
- Model: 7556

- b. Toner is automatically supplied to us through Capitol Office Solutions. If there is an emergency and toner is needed immediately, please call the above number.

O. Building Contacts:

Angel Grant
Assistant Property Manager
Cambridge
560 Herndon Parkway, Suite 210
Herndon, Virginia 20170

Main: (703) 709-8866 Ext. 6601
Direct: (703) 925-5201
Cell: (202) 369-1779
Fax: (703) 709-9086
www.cambridgeus.com

For service requests please complete a request on the website above.

P. STORAGE

10th Street Storage Unit
3000 10th Street North
Arlington, VA 22201
(703) 243-3255

Q. Merchandise

All merchandise is sold through Spreadshirt.

R. SCI lapel pins:

Crown Awards
Custom Sales Department
1800-542-6044
www.crownawards.com

S. Internship Program

All internship and employee inquires and applications go to the Jobs@sistercities.org email address which is managed by the Executive Assistant. Each time an inquiry is made, an automated message will respond to the applicant.

The Executive Assistant will manage the Volunteer and Employment Opportunities page of the website to make sure all listings and information is up-to-date and accurate.

When the Executive Assistant receives internship inquires, they should be immediately filed into Share>Administration>Internship Applications> (appropriate department)

Each Department will be in charge of monitoring and accessing their department's intern folder and the hiring process will be carried out under the direction of Department directors.

Once an intern is hired, their immediate supervisor must have them fill out the documents listed below and submit them to The Finance Director to keep on file before the end of the first week of employment.

- W-9
- I-9
- Offer letter with stipend amount and dates of employment clearly stated
- Emergency contact information

At the end of every intern's period of employment with Sister Cities International, the immediate supervisor must fill out a check request form for disbursement of their allocated stipend amount and submit it the Finance

Department. All interns must fill out an exit survey before they depart SCI. The Intern Exit Surveys are stored on the Share Drive and are maintained by the Executive Assistant.

T. Temporary Positions

To hire for temporary positions, an account is held at Careers in Nonprofits. Our contact here is:

Andrea Silva
Recruiter, DC Temp Division
1025 Connecticut Avenue
Suite #1000
Washington, D.C. 20036
Tel: 202-828-1274
Fax: 202-521-3550
asilva@cnpstaffing.com
www.CareersInNonprofits.com

U. Fiscal Procedures

Any policies and procedures pertaining to the management of monetary and physical assets, grant applications and management, and loan applications and management can be found under the section titled “Fiscal Policies and Procedures” of this Governance Manual.

V. Booking Travel

Travel costs are the expenses for transportation, lodging, subsistence, and related items incurred by staff who are traveling on official business on behalf of SCI. Travel costs are allowable when they are directly attributable to specific work for SCI. Advance approval of costs is required for all out of town travel.

a. Travel Request Procedures for Supporting Staff and President:

- i. Staff member initiates travel request by clicking on the appropriate form link:
 1. *Staff travel request form*: www.sistercities.org/travel-request-form
 2. *President travel request form*: www.sistercities.org/sci-president-travel-request-form
 3. This form includes fields for traveler’s name(s), travel dates, estimated travel, destination, amounts (for airfare, train, rental car, per diem, etc) and business purpose.
- ii. Once a travel request is submitted by staff member, the system automatically sends an email to the Finance Director for review. This request is sent to the who in turn, prints a physical copy of the request for President’s approval.
- iii. Travel requests for the President are forwarded to the Chair of the Board for electronic approval and to the Finance Director. The Chair of the Board returns the President’s approved request via email to the
- iv. This Executive Assistant gives all approved original travel requests to the Finance Coordinator for safekeeping, GL account verification, determination of cost share and for reconciling to the bank statement charges upon receipt. A hardcopy copy is provided to staff member in order to book travel through Carlson Wagonlit Travel Agency (an established vendor for SCI) or other travel websites (hotel, rental car, etc) approved by the President.
- v. For air travel booked online via CWT’s website, CWT sends an email to the Finance Director giving notification that there are travel itineraries awaiting approval. Once the Finance Director

approves the requests online, the staff member is notified that the travel request has been approved and the process is complete.

W. Programs

For the annual programs implemented out of the DC office of SCI, please follow the instructions below.

a. Annual Awards Program

i. Publicity (6 months to conference)

1. E-newsletter announcing the Annual Awards to all members with link to webpage (make a monthly announcement)
2. Make sure ALL documents (application, webpage, e-blasts) are up to date, accurate, and clear with dates, new awards, requirements, etc.
3. Confirm that the online application form is set up and current

ii. Judges (3 months to conference)

1. Put together list of potential judges (always include DoS program officer)
2. Send a invite letter/email to potential judges informing them of the procedure and date of judging
3. Confirm judges

iii. Submitted Applications (deadline 3 months to conference)

1. Make sure each application has all of the required materials (application form, program narrative and payment) If any material is missing, contact applicant directly for missing item(s).
2. Check with Membership Coordinator to make sure each community is a member in good standing of Sister Cities International
3. See if community's application fits award category (community size) for which it is applying
 - If award category should be switched, contact applicant directly informing him/her of category change
4. Email city contact confirming receipt of application
5. Maintain a spreadsheet of all the applicants, their contact info, application info (whether or not they've submitted each item, which award they are applying for, date application was received) and save it in shared drive under Annual Awards Program -> Annual Awards -> AAcurrent year
6. Once all applications are in, put together judging binders (1 per judge, plus 1 to keep for records)
7. Mail completed binders and letters to judges (a week before actual judging)

iv. Post judging

1. Draft winners' letters
2. Send out winners' letters electronically and via mail immediately after judging
 - CC mayor and mail a copy of letter to mayor
3. Email State Coordinator with a list of all winning entries from their state.
4. Put together non-winners' letters

5. Send out non-winners' letters electronically and via mail after winners' letters go out
6. Add winners announcement on website with winners' program summaries
7. E-newsletter announcement

Shared drive under Annual Awards Program -> Annual Awards.

X. Young Artists and Authors Showcase

- a. *September to April*
 - i. Send out reminder e-newsletter about end of April deadline and theme
- b. *April*
 - i. Create database/tracking spreadsheet for all entries on the shared drive under Programs -> Young Artists or Young Artists Showcase -> YAcurrentyear
 - ii. Make sure that all entries are the correct size, have paid, and are members in good standing of Sister Cities International in order to accepted
 - iii. Store all boxes of art in the kitchen area
 - iv. Finalize theme for next year's competition (mirror conference theme or different?)
 - v. Draft brochure for next year's Showcase
 - vi. Meet with Publications Manager to go over layout of new brochure and assist with design as needed
 - vii. Post on website and distribute it through e-news
- c. *May*
 - i. Log entries upon arrival (sponsor city, name, email and address, artist/author contact information, title of piece, if payment was included)
 1. Take a photograph of each piece of art as it is received
 - ii. Process checks, make photocopies and then hand over to admin/finance staff
 - iii. Finalize 3-4 judges for panel
 - iv. Coordinate judging date
 - v. Follow-up with any issues, i.e. missing fees, forms, sponsor info, etc.
 - vi. Set judging criteria and logistics
 - vii. Create reports for judging process
 - viii. Attach display numbers to each piece of artwork
 - ix. Convert office space into temporary gallery for judges to view artwork
 - x. Gather any supplies needed for judging process including clipboards, pens, refreshments
- d. *June*
 - i. Tabulate results of judging process
 - ii. Draft press release announcing winners of Showcase
 - iii. Update website to include winners of the Showcase
 - iv. Emails to winner and non-winner sponsors to let them know of judges' choices
 - v. Send out letters and certificates of merit for all winners and non-winners
 - vi. Process and cut a check for each grand-prize winner and add to their packet
 - vii. Package up all non-winning artwork that requested return and send via FedEx ground track, along with non-winner letter and participants' certificates
- e. *July*
 - i. Plan conference display, include artists' names, home towns, titles of artwork, artists' words, title sign for the Showcase with sponsor information



- ii. Pack up award winning artwork and easels to ship with other materials for conference
 - iii. Send out request for touring cities to membership and begin to build the tour schedule for the year
- f. *August*
- i. Respond to email and phone inquiries about the Young Artists Competition
 - ii. Send out previous year art that needs to be returned
 - iii. Send art to first tour stop if it did not go directly from conference

Shared drive under Programs ->Young Artists or Young Artists Showcase -> YAcurrenyear

Y. High School Homestay Exchange Program

Sister Cities International acts as the intermediary between sister city members who want to bring high school students to study in the U.S. for a semester or an academic year and American Cultural Exchange Service.

Process:

- a. Student application arrives in the mail from April 1 to June 1.
 - i. Check that all pages have been signed and dated, the student has selected semester or academic year program, the student has included 8 passport size photos.
 - ii. Also, make sure that the student won't be younger than 15 or older than 18 ½ upon arrival in the U.S.
 - iii. The application should also include the Initial Information Card (this document is used to generate the DS2019 form)
- b. Enter the student application information into a new excel spreadsheet on the shared drive under Programs-> High School Homestay -> upcoming school year -> Student Information
 - i. Enter the local coordinator (LC) and international coordinator (IC) contact information into the excel sheet. If it is a community that has hosted in the past, reconfirm the LC and IC contact information. If it is a new community, you will need to request the LC and IC contact information.
- c. Once you have complete contact information for all LCs and ICs, send a spreadsheet of this information to ACES.
- d. Make a complete photocopy of the student application if you receive it in the office and mail the originals to ACES.
- e. Save all copies of documents on the shared drive.
- f. Create a hardcopy folder for each city
- g. Email a payment invoice to the international coordinator and cc the local coordinator. Payment can be made by check, credit card, or wire transfer.
- h. Once you have received payment, email a payment receipt to the international coordinator and cc the local coordinator.
- i. The first mailing to the international coordinators (May) will include:
 - i. SLEP test materials (make copies of what we already have because ETS no longer prints it) and the student interview materials.
- j. Once a chunk of payments have been received, Sister Cities needs to send a check to ACES. We keep \$375 of the total payment and all the rest goes to ACES.
- k. The second mailing sent to the international coordinators (June) include:
 - i. DS 2019 Form



- ii. Instructions for registering in the SEVIS system (www.fmjfee.com)
 - iii. Guidelines for the pre-departure information
 - iv. Health insurance information.
- l. The Flight Form must be emailed to the international coordinators in June to be submitted via email to SCI by July 15.
- m. SCI communicated mainly with the international coordinators. Once the application process is complete, it is mainly ACES who communicates with the local coordinators, and the LCs submit all their paperwork directly to ACES.
- n. In May, will mail out the LC application form, LC contract, and LC handbook directly to the U.S. communities
- o. Sometime during the summer (June/July) ACES will set up a local coordinator training via conference call.
- p. Make sure to touch base with ACES throughout the summer to make sure that all the paperwork is filled correctly and completely by their September 1 deadline for State.
- q. Throughout the exchange program, LCs must fill out and submit Student Progress Reports and Contact Calendars to ACES.
- r. If LCs successfully submit all required paperwork, they will receive a stipend from ACES at the end of the program year. LCs receive \$525 per year student and \$425 per semester student.

For an extended timeline and list, see the Shared drive under Programs-> High School Homestay

Z. External Affairs

- a. *Guidelines for conference committee selections*
 - i. Cities hosting the annual conference must be a top tier city, as defined by the top fifty most populated cities in the United States based on the U.S. Census, while there are no size restrictions on the cities bidding for the regional conference.
 - ii. The country will be divided into six regions, with Sister Cities International hosting one Fall regional conference and one Summer annual conference each year. Each region will host the annual and regional conferences on a rotating basis, ensuring each region hosts one approved meeting every 3 years. There will be two leadership meetings held each year, one in the Spring in Washington, DC, and one each Fall that will align with the fall regional conference location.
 - iii. Regions will be defined by a map (see S:/ExternalAffairs/Conferences/RFP) and include: Northwest, West, Southwest, Midwest, Northeast and South.
 - iv. The rotation schedule will apply to both annual and regional conferences, and remove the international site location from the rotation, while the organization will continue to celebrate the anniversary years ending in 5 and 0 in Washington, DC.
 - v. A city that hosts either an annual conference or a regional conference cannot host that consecutive event the next time an annual conference or regional conference comes to their region.
 - vi. Each year, the conference committee is responsible for ensuring that the rotational schedule for the organization is projected five years forward, with city designations selected for the regional and annual conferences three-years in advance.
- b. *Site Selection Process for Annual & Regional Conferences*



- i. Sister Cities International's policies for selecting the site of future conferences allow participation from all of the membership in submitting a proposal from eligible and available options. An outline of the present process is as follows:
 1. The SCI Conference Committee requests interest bids from the eligible cities approximately three years in advance by sending out a Request for Proposals to our membership, sending specific email to eligible cities in the membership and posting online. This RFP is two part – first a letter of intent is submitted followed a month later by a full proposal.
 2. Once all letters of intent are received, eligible cities will then be forwarded onto the HelmsBriscoe hotel broker representative to begin collecting bids for the hotels in each of the eligible cities. This information is required by the Conference Committee during full proposal evaluation process. Venue/Hotel Request for Proposals will be sent by HelmsBriscoe to the selected city's Convention & Visitors Bureau and eligible venues/hotels, and all hotel bids are sent to Jennifer Gachui at jgachui@hemsbriscoe.com for initial review and submission to SCI staff and the Conference Committee for review.
 3. Once full proposals are received for both city site selection and hotel proposals, they are reviewed by the SCI Conference Committee to select a city location and this recommendation will go to the Board of Directors for approval.
 4. With the site selected, HelmsBriscoe will handle the contract negotiations on behalf of SCI and upon approval and agreement of the contract, SCI will then sign the final contract with the Conference hotel and proceed with the detailed planning of the conference.

Past RFP documents are located at S:/External Affairs/Conferences/Annual/RFP

AA. Hotels and contact information

For hotel selections, please utilize the HelmsBriscoe hotel brokers below:

Jennifer Gachui
Director, Global Accounts
HelmsBriscoe
TEL: 702.577.3570
jgachui@HelmsBriscoe.com

Vickie Corder, CMP
Director, Global Accounts
HelmsBriscoe
TEL: 904.268.0045
vcorder@HelmsBriscoe.com

BB. Written Documents and Letters

a. *Typeface:*

The Sister Cities International logotype in the Member Badge is written in "Helvetica Neue Lt Std" font. The font is available for purchase at www.fontfactory.com.

b. *Logo and Member Badge Colors:*

The color codes for the blue of the Member Badge are:

PANTONE® 661C

CMYK Print Processing:

- Cyan:100
- Magenta: 90
- Yellow: 0
- Key (Black): 1

Web Colors:

- Red: 33
- Green: 63
- Blue: 152

- i. Hex color: #213f98

c. The color codes for the green of the Member Badge are:

PANTONE® 360C

CMYK Print Processing:

- Cyan:64
- Magenta: 0
- Yellow:100
- Key (Black):0

Web Colors:

- Red: 102
- Green: 188
- Blue: 70

Hex color: #66bc46

CC. Letterhead

Artwork files for Sister Cities International letterhead can be found on the Shared drive at:

S:/Communications/Logos & Branding/SCI Logos/SCI Logos 2012/Letterhead

DD. Primary Printing Company

Shawn Paxton
Imlay International, LLC
5101 Backlick Rd
Suite I
Annandale, VA 22003
703-914-0526 (office)
703-973-8804 (cell)
703-991-6594 (fax)

EE. Website

Original Designer and contact Information:

TAOTI
TaotiCreative



David Hanna
dhanna@taoti.com
www.taoti.com
127 C St SE
Washington, DC 20003
202.546.8946 TEL
202.280.1406 FAX

a. Login/Creating a profile

- i. Before you log in you must create a new profile. To do this click on Login at the top of the website. This will bring you to the login page where you can enter a username/password. Below this you'll see two options: Create new account and Request new password.
- ii. If you select Create new account you'll be taken to a page where you can enter in basic information to create your account.
- iii. The email address you use will become your username, and you will be sent an email with a temporary password.
- iv. When you log in the first time you will be directed to a page to reset your password, which looks like this.
- v. You can also request a new password at any time by going to the login page and clicking the link Request a new password
- vi. After logging in, you can change information about yourself by clicking on the Account link at the top of the browser window
- vii. From there click on Edit Profile to change information like your mailing address, whether you receive emails, etc.
- viii. People who create an account through the website will receive email updates from Sister Cities International, but only accounts associated with a dues-paying city will have access to the Members Only section of the website.
- ix. Most city memberships are moderated, meaning you will have to be invited by the primary contact to join.

b. Primary Contacts

- i. The primary contact for a sister city program will have special administrative control over that city's account on Sister Cities International's website. To be listed as the primary contact, you must contact Sister Cities International and request to be added. This request can be sent to membership1@sister-cities.org or woodruff@sister-cities.org.
- ii. Once Sister Cities International has made you primary contact, your Account page will have two extra sections: Edit Group and Manage Group.
- iii. If you click on the Manage Group button you will have the option of viewing your current membership as well as inviting new members.
- iv. If you click on Invite Members you can enter in the email addresses of members (separated by commas).
- v. After you enter in the email addresses, the recipient will receive an email like this:
- vi. Once the member accepts the invitation they will be given access to the Members Only section.
- vii. If you click Edit Group on the Account page then you can edit the public profile of your sister city program.
- viii. This includes important information like:



1. Mailing Address
 2. Primary Contact
 3. Billing Contact
 4. Areas of Interest
 5. Website, Facebook, and Twitter information
 6. Notes on your program
 7. Your elected official
- ix. *NB:* In order to add a new sister city partnership, however, the primary contact must email Sister Cities International staff and provide a copy of their new partnership agreement. Staff will then register this new partnership and it will appear on the website.
- x. It is critical that members keep this information up to date. Any changes made are essentially changes to our database, and all future mailings, invoices, etc. will be based on the information that is entered.
- xi. Currently only the website and areas of interest will be visible on the city's page. However, after the next phase of the website's development members will be able to post text as well as their contact information.
- c. *Members Only*
- i. The Members Only section can be accessed from the Members section at the top of the website. In order to access this section you must be logged in, and your account must be associated with a member city in good standing.
 - ii. In the Members Only section you'll find a number of areas where you can download Sister Cities International documents or materials. This includes Webinar recordings, toolkits, information on visa services, member updates, and information on any available grant opportunities.
 - iii. In addition, there is a Submit Your Story section where members can provide Sister Cities International with information on their activities. This information can be used by Sister Cities International staff to create material for member updates or articles to be featured on the website.
 - iv. If you notice any mistakes, omissions, or other changes that need to be made to the site, or if you have any questions, please email them to Taylor Woodruff, Membership Coordinator, at twoodruff@sister-cities.org.

FF. Membership

- a. *Payment of Renewal Dues by Sister Cities International Members*
- i. At the end of every work week the Membership Coordinator/Membership Intern shall review the Check, Credit Card, and Wire log to confirm what members have renewed their dues during the past week.
 - ii. Each member who has paid should have their payment registered in their cities profile in the website/database, including date of payment and any other relevant information
 - iii. If the payment has come past-due, then check to ensure the member's profile is changed to "Paid".
 - iv. A confirmation email should be sent to both the primary contact and the billing contact confirming receipt of the dues, date of receipt, dues amount, and the date that their membership is paid through (either June 30 or December 31 of the following year). The email



should also indicate when the member should expect to receive their Membership Directory and renewal packet.

- v. If the payment is received prior to the Membership Directory mailing (which usually occurs in July prior to the Annual Conference) then the member should be informed that they will receive their directory in July. If the payment is received after the initial mailing goes out, then:
 - 1. Check if the member was sent a directory/packet in the initial mailing. If the member received the mailing, then simply send the member a certificate confirming membership along with any other communication items deemed necessary (consult Membership Director and External Affairs Director)
 - 2. If the member did NOT receive the mailing, then send a full packet with membership directory. Packet materials can be found in Membership/Renewal Packet. Be sure to also include a Membership Directory, and to personalize the pro forma letter from Sister Cities International President. Consult with Director of Membership and Director of External Affairs to determine if additional materials should be included.
- vi. New Members
 - 1. If the payment is for a new member, then the Membership Director should be informed so that he/she can call the primary contact to thank them for their membership and orient them on Sister Cities International's services.

b. Acknowledging Major Anniversaries

- i. On the first of the month the Membership Department should check to see what programs will have partnership anniversaries in increments of 5 years which are due to arrive the following month. This can be found in the spreadsheet under Membership/Anniversaries
- ii. Two certificates for these partnerships should be created using the template found in Membership /Anniversaries.
- iii. The primary contact for the U.S. member should be contacted and an address to which the certificates are sent should be confirmed.
- iv. The certificates should be mailed to the respective partnerships in an envelope with a cardboard backing via USPS.
- v. After the certificate is sent, it should be noted in the Anniversaries spreadsheet with the date it was mailed.

c. Types of Affiliations/Affiliation Policy

- i. A Sister City or Sister Cities relationship is formed when the mayor or highest elected official (or, if elections do not take place, highest appointed official) from a U.S. community and a community in another country or territory sign a formal agreement on behalf of their communities endorsing a "sister city/cities" relationship. Sister city agreements shall be considered active/valid unless otherwise indicated by one or both of the respective communities.
- ii. Sister Cities International shall formally recognize only those relationships by cities/members in good standing (i.e. who are current on membership dues) in its Membership Directory or on its website. However, Sister Cities International shall not assert as invalid or otherwise impugn the legitimacy of those relationships formed by non-members.
- iii. A Friendship City or Friendship Cities relationship is often formed by cities as a "stepping stone" to a more formal "Sister City" agreement. Typically Friendship City agreements are referred to



- as such in the formal documents that are signed. Sister Cities International shall recognize Friendship City relationships by members in its Membership Directory and website.
- iv. To place a relationship into Emeritus status, the mayor or highest elected official of the U.S. community must write a letter to the mayor of the foreign city indicating that they wish to remain sister cities, but understand that the relationship will remain inactive until such time as both cities are able to sustain an active relationship. Sister Cities International should be informed in writing by the mayor of the U.S. city of the situation. Sister Cities International will then place the partnership into Emeritus Status and will reflect this status in directories and all lists of sister city programs.
 - v. If a community wishes to terminate a sister city relationship, then a letter from the mayor or highest elected official of the U.S. city should be sent to the mayor of the sister city. Sister Cities International should be informed of this action in writing by the mayor of the U.S. city and Sister Cities International will then remove the partnership from its directories and all lists of sister city programs.
- d. *Recognizing a New Sister City Partnership*
- e. If a member contacts Sister Cities International to indicate that a new sister city relationship has been formed:
- i. Request a signed and dated copy of the agreement. This may be a scanned copy.
 - ii. Upon receipt of the agreement, file it under Membership/Partnership Agreements with the title “U.S. City, State-Foreign City, Country”.
 - iii. Open the Excel file in Membership/Anniversaries and enter the name of the partnership along with the signing date.
 - iv. Open the member city’s profile in the database and enter the name of the new sister city.
 - v. If the foreign city does not have a profile in the database, create a profile and list the U.S. city as the sister city. The name of the foreign city should be “City, Country”, and GPS coordinates should be entered using information found on Wikipedia. Make sure the foreign city is listed as “Paid”.
 - vi. Search for both the U.S. city and the foreign city in the city search and make sure the partnership is shown and the geographic locations are accurate.

GG. Cities seeking cities

- a. *New CSC Inquiry*
- i. Every morning, the Fellow should check for new CSC requests
 - 1. Member Cities submit inquiries in one of three ways:
 - (1) checking the “Cities Seeking Cities” box in the backend of their profile;
 - (2) sending an email inquiry;
 - (3) or, inquiring over the phone.
 - 2. Non-member International Cities submit inquiries in one of three ways:
 - (1) Filling out the CSC form for Int’l cities, populated on the backend;
 - (2) sending an email inquiry;
 - (3) or, inquiring over the phone.
 - ii. For non-member International inquiries, do the following
 - 1. Create city profile in the backend of the directory
 - (1) Fill out only the following information:
 - i. Title: “City, Country”



- ii. Description: “City of Name-of-City”
 - iii. Location (including coordinates)
 - iv. Cities Seeking Cities
 - v. Authoring Information (CSC Fellow)
 - iii. For Member inquiries: the Fellow should immediately call for confirmation of the interest and to set up a call for the Follow-Up Questionnaire call with the CSC Manager (if the CSC Manager is not the member’s Primary Contact).
 - iv. Upon confirmation of interest, the CSC request should immediately be entered into Salesforce (Prerequisites: City Account must already be established *see
 - 1. Also include a “Event” in Salesforce for: (put on outlook)
 - (1) the initial call to fill out the Questionnaire
 - (2) 2 week follow-up call/email
 - (3) 6 week Membership Director consultation
 - v. The CSC Manager will Conduct a follow up call using the CSC Questionnaire, found here: (S:\Membership\Cities Seeking Cities\Follow Up Questionnaires)
 - 1. The Questionnaire should be attached to the Salesforce opportunity
 - vi. Save the Follow-Up Questionnaire on the S Drive in a folder entitled (CSC – *City Name), found here: (S:\Membership\Cities Seeking Cities\CSC Case Folders)
 - vii. The manager should do and request the following things during this call:
 - 1. Provide the member with recommended local outreach based on the conversation
 - 2. Inform the contact how national and international outreach will be conducted, including what organizations will be contacted.
 - 3. Request supplemental materials that can support the inquiry, particularly related to the city’s areas of interest, for example:
 - 4. Education (information on Universities, school districts, int’l programs)
 - 5. Economic Development (city’s economic development plan, COC brochures, etc.)
 - 6. Arts and Culture (information on museums, art or music festivals, etc.)
 - viii. All subsequent calls or emails with either the CSC local contact or an individual contacted during outreach must be recorded as a “Call” in Salesforce.
- b. Outreach and Follow-up**
- i. All background research should be completed within 2-3 days of each inquiry.
 - ii. All emails and phone calls should be recorded as a “Call” in Salesforce
 - iii. After 2 weeks from the initial Questionnaire call, the Fellow must either email or call the CSC Primary Contact for updates
 - iv. This phone call should review national outreach, as well as local outreach conducted by the CSC local primary contact
 - *regular communication between HQ and members is key to the CSC process due to length of time it can take.
 - v. Every inquiry should be reviewed after a 6 week period with the Membership Director to assess progress and to troubleshoot challenges faced during the process.
 - vi. A follow-up call should be scheduled with the CSC local contact
- c. Cities Seeking Cities-Salesforce**
- i. Create New City Account for Cities Seeking Cities (If one does not exist)



1. Click on “Account Tab”
2. Click New
3. Create name “City of Chicago, IL”
4. Fill out the following information in the new account: (Should match Primary Contact information from the website)
 - (1) Type: Other
 - (2) Phone number
 - (3) Fax Number
 - (4) Website
 - (5) Address
 - (6) Billing
 - (7) Primary contact/shipping
 - (8) Description: “Member Organization”
 - (9) Press “Save”
- ii. Scroll and click on “New Contact”
 1. Add specific CSC primary contact
 2. Press Save
- iii. *Create a Cities Seeking Cities Profile (If the city profile already exists)*
 1. Scroll down to “Opportunities” and click on “New Account Donation”
 2. In drop-down, click “Donation”
 3. Press continue
 4. In “Opportunity” put “CSC City, State” (CSC Denver, CO)
 5. In “Close Date” field, pick exactly one year from the date of entry
 6. In “Description” field, type in the general thematic and geographic interests and the name of the point of contact.
- iv. *Create a new Task for Cities Seeking Cities*
 1. Click on “New Task”
 2. Enter follow-up information in the description box
 3. Click “Send Email Notification”
- v. *Add Contact to CSC Opportunity*
 1. Scroll to “Contact Roles”
 2. Click “New”
 3. Contacts from the City Account should auto fill
 4. Click on Primary Contact
 5. In drop down choose “Decision-maker”
 6. Click Save
 7. Click on CSC Primary Contact
 8. In drop down choose “Influencer”
 9. Click Save
- vi. *Log a Call (post incoming call or pre outgoing call)*
 1. Fill in all information
 - (1) Enter “Follow-Up Task” information
 - i. For Due Date, choose soonest realistic date
 - ii. Close after notes are entered and press Save



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