

Manual of Instruction

Section Name: Structure & Organization

Section Number: 3.01

Title: State Database Manager

Description:

The role of the State Database Manager is to maintain all membership records and process membership dues.

1. Process Dues (Check) – Membership dues checks that come directly to the state or through the local chapter are sent to the State Database Manager. Once received the SDM needs to record the dues paid in the system and send a renewal confirmation email.
2. Process Dues (Online) – The SDM is notified when dues are paid online via PayPal. The SDM will then record the payment in the system and send a renewal confirmation email.
3. New Members (Paper Application) – Any new members that submit a paper application must be manually typed into the system and their first dues recorded.
4. New Members (Online) – New members that apply online are automatically inputted in the system. The SDM will approve their membership once dues are received. A new member confirmation email is sent once the dues are entered. If the person elects to pay dues by a check then the SDM must follow up with this person to obtain the dues.
5. Region Reports – Quarterly an excel spreadsheet is exported from the system and sent to each region director with just their regions lapsed members.
6. Chapter President Reports – Every other month an excel spreadsheet is exported from the system for each chapter. Each chapter president is then emailed this report of just their lapsed members.
7. Renewal Notices – At least once a month all lapsed members are sent an email stating their membership is up for renewal and directions for renewing their membership. This usually is about 100+ emails that are sent.
 - a. Renewal notices are sent out 2 months before they are due and again at 1 month prior. They are then sent out each month for the next 4-5 months.
8. Removal of unpaid members – Every quarter the SDM goes through the lapsed members. Anyone who has not renewed in over a year is marked as inactive. They will not appear on any lapsed member reports.
9. Tracking down dues – There are times that members tell you that they paid and the SDM needs to track down why the local has not sent the check in.
10. Officers – In June all chapter officers and region officers need to be updated in the system.
11. Dues Amounts – The SDM is responsible to maintain all chapter and region dues amounts in the system.
12. Chapters and Regions – The SDM is responsible to maintain an accurate list of all chapters and their associated regions.

Reports/Functions available to State Officers or Chairs

- 1) EC – has full access to the entire Membership System

Manual of Instruction

Reports/Functions available to Region Director

- 1) They have the ability to print and export into excel their chapter's membership rosters.
- 2) They can email all members in their region.

Reports/Functions available to Local Chapter Officers

- 1) They have the ability to print and export into excel their membership roster.

Financial Implications

Currently any changes to the system are done through the web site line in the budget.

Included in Toolkit

For more information go to:

NA

Date of Board Approval: 4/6/2013

Effective Date: 4/6/2013

* Underlined passages denotes wording from the NYS Women, Inc. Bylaws

n/a