**Directions for Membership Secretary**

1. **Throughout month collect application forms and changes to existing members’ information or status. Do not make changes in database. Take action on new member applications:**
   1. Review form for completeness. Phone applicant with questions.
   2. Send email to sponsor and applicant notifying them that application received and induction will be scheduled for next luncheon.
   3. Scan written applications, download online applications and place in “Pending Application” folder.
2. **One week before the lunch meeting:**
   1. Send email to new members to be inducted and their sponsors reminding them that their induction is scheduled for next luncheon. Ask for reply.
      1. Remind sponsor to call the hotline that a guest will be attending.
   2. Once new members confirm attendance, enter all data into Main Database. *(May have to delete inductees who don’t show up at meeting.)*
   3. Enter all information changes for existing members into database. Assign a Badge number and record on “Pending” application form.
   4. Make changes to Google Groups email list for existing members.
      1. Remove members who have resigned
   5. **Monday** before the meeting, send email to Attendance Chairman of current member count and those who have resigned or become inactive and won’t be at the lunch.
3. **Thursday before the lunch meeting**
   1. Send email to new members to be inducted and their sponsors reminding them that their induction is scheduled for next luncheon.
      1. Ask them to arrive by 10:30 for orientation meeting.
   2. Prepare an envelope for each new member to be inducted (with name label)
      1. Process flow sheet (with new Badge number)
      2. Application form
      3. Annual Roster
      4. Newsletter supplied by Jim Johnson will be added at meeting.
   3. Email a list of Birthdays for the month to the Little SIR
      1. Since there is no meeting in May, send lists for May and June prior to the June luncheon.
      2. Since there is no meeting in December, send lists for December and January prior to the January luncheon.
   4. Enter data for Monthly Membership Changes into Excel file *(D:/Branch 116 Website/BEC Records/2017 BEC Records/****2017 Monthly Branch Membership.xls****)*
      1. Create a new Worksheet for current Month (copy format from prior month)
      2. Show headcount for active and inactive members.
      3. List all individual member status changes.
      4. Include applicants to be inducted at meeting.
   5. Enter data for Year To Date Member Information Changes into Excel file *D:/Branch 116 Website/BEC Records/2017 BEC Records/****2017 Year To Date Membership Changes.xls****)*
      1. Enter all the email, address, etc, changes for the past month
      2. List all individual member status changes.
      3. Include applicants to be inducted at meeting.
   6. Upload both documents to the website.
   7. Print 15 copies of Membership Changes for the month.
4. **Weekend before Luncheon**
   1. Print badges for lunch meeting. Check count with database and membership change sheets.
   2. Instructions and template is stored on the web.
5. **At the Luncheon**
   1. Give badges to Attendance Chairman.
   2. Give new member packages to Max Foust (Newsletter added by Jim Johnson)
   3. Hand out monthly Membership Changes sheets at BEC.
6. **Following the Luncheon**
   1. **Finalize Database and Applications**
      1. Make any corrections in Active Database for inductees who didn’t follow through, etc.
      2. Save a copy of database to “Workfile” and “Backup” folders.
      3. Move application forms from “Pending” folder to “Active” folder. File hardcopy in binder.
   2. **Prepare Form 27 for Distribution**
      1. Open existing “***Form 27 201\*.xlsx***” stored in Box files under “Membership Secretary Documents.”
      2. Add current data to Form 27 and enter current date at bottom. Save file with same name in same location. (Note: if calculating median age, sort Actives by birthdate and add a column with formula “=(TODAY()-I2)/365.25”
      3. Upload Form 27 to website. Store under SIR 116 File Storage Site/ BEC Records / 201\*\_Recs /Form 27 201\*.xlsx
      4. Save a separate copy named “***Form27 BR116 A2 R06 2016-xx.xls***” for distribution and save in *D:/Branch 116 Membership.* Email a copy of the Monthly Form 27 to the predetermined distribution list.
   3. **Send Latest Info to Newsletter**
      1. Email Membership Status Changes article and list of Birthdays to Newsletter for publication in following month.
   4. **Update Website, Google Groups and Member Portraits**
      1. Post or confirm that all information is listed on website: Agendas, Minutes, Form 27, & Mbr Changes.
      2. Update the Branch portraits to add new members, delete those resigned, etc.
      3. Google Groups: Add new members, delete resigned members but leave inactives on list.
7. **Follow up with New Members**
   1. Enter new member email addresses into Google Groups list
   2. Mail a Welcome letter to each new member.
   3. Send email to new members showing their data.
      1. Ask them to confirm it is correct.
   4. Review each new member’s application form for activities listed and send an email to the activity chairmen asking them to contact the new member(s).

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