

Academy of Lifelong Learning
Toronto
Membership Committee
User Guide

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Membership Committee User Guide:

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1. Introduction

This manual provides a brief overview of the roles and responsibilities of the Membership Committee. The Membership Handbook provides a much more detailed description of how the procedures are performed. This is available online only to Board members, but Committee members can get a copy from the Membership Chair or Vice Chair

As well it provides a schedule of the events and the other committees that we interact with.

It is intended to be a brief introduction to the committee.

2. What We Do

The main responsibilities of the Membership Committee are:

- Registration for workshops, special events
- Monitoring and reporting on membership numbers
- Printing badges for special events
- Identifying volunteers
- Communications with new/potential/returning members
- Provide email list to Communications Committee
- Track potentials (e.g. Spring Talk attendees)
- Communicate with Facilitators re workshop registrants

The details for these procedures are described in the Membership Committee Handbook.

3. What are the Role Descriptions?

a. Chair

- Organize and chair committee meetings; arrange for a committee member to take minutes
- Prepare monthly report and attend Board meetings
- Manage assignment of tasks
- Train Vice Chair

b. Vice Chair

- Back up to Chair

- Attend Board meetings
- c. Database Manager**
 - Set up database
 - Train new Committee members
 - Resolve any technical issues and provide support
 - Update with new functions as required
- d. Volunteer Coordinator**
 - Welcome new members and let them know about opportunities to get involved
 - Use the database information to identify who may have appropriate background/skills for different areas
 - Work with Board nominating committee to recruit Vice Chairs and members for committees
- e. Past Chair**
 - Mentors Chair and Vice Chair
- f. Member**
 - Participates in meetings
 - Helps with registration for workshops, special events, other duties
 - Can vote on decisions requiring a Committee decision
- g. Ex Officio**
 - Long term members who continue to help out
 - Not allowed to vote on issues

4. Where are the Procedures Described?

The following procedures are described in the Membership Handbook:

- Finding information (Section 3)
- Checking Payments (Section 5)
- Membership types (i.e. Status) (Section 6.2)
- Registration validation process (Section 6)
- Potential Members (Sections 6.2 and 9)
- Entering workshops and facilitators (Section 7)
- Cancelling workshops (Section 8)
- Spring Talks (Section 9)
- Randomization (Section 10)
- Confirmation and Waitlists (Section 11)
- Withdrawals (Section 12)
- Name Badges (Section 13)
- Class Lists and Attendance Sheets (Section 14)
- Volunteer Coordinator Job Description and Procedures (Sections 16, 17)
- Reports (Section 15)
- Email Communications (Section 18)

5. Registration Cheat Sheet

Our most important function is registering members, and this is a quick check list of the steps involved. The Membership Handbook contains a more detailed description of the steps and especially how to deal with issues that arise.

1. Open Filemaker and open a second window using 'Window' at the top of the screen; click on 'New'

- 1st window: Registration: Review User Registration, click on 'show records to be reviewed'
 - 2nd window: Member Information
2. Check that person has paid
 - If someone else is doing this, make sure it says they have paid in the User Comment. Do not process until the person has paid.
 3. Find next registration request record to be reviewed (check that User Pressed Submit' says 'yes' (it should do so if you are processing using 'show records to be reviewed') (do not process records that say Action = 'Discard')
 4. If person has paid, continue processing; if not move to next record ('>' at top)
 5. Hit Orange tab 'Create/Update Member record' (always do this to update the Consent information)
 6. In Member record information (right hand side):
 - Hit registration number to get next number
 - Verify that basic information was copied across (name, address, email, consents). If not, you may need to check the membership record and see if some data was entered incorrectly (e.g. Email address). You can always update the data directly in the member record and discard the registration record (using 'Action'). Or set it to 'Followup Required' and contact the person.
 - Add status, payment amount
 - If they are shown as 'potential member' with a 'Potential added' date remove this
 - The system will check that a facilitator has not registered for their own course
 - Check that workshops do not overlap
 - Enter date that you are registering them ('Date Registered')
 - Hit button to create registration record
 - Say yes when it asks you to save
 7. Go to the Membership window (You can also do this by clicking on > on the right-hand side User Registration Page. A new instance of their Membership Record will open. You can check the information there and then close it if all is correct.)
 - Do a find on the registration number you just created
 - Check that all information looks correct
 - Add a note showing the workshops they registered for, the date (mm/dd/year) and your initials
 - Hit Find and say yes when it asks you to save
 8. Go back to the registration window and move to the next number
 9. You will send confirmation letters to the people you registered AFTER Randomization, so keep track of which people (i.e. registration numbers) you registered
 10. For any New members added, send Communications an email with their name and email address and add to the Notes that you have done so.
 11. When people decide to add workshops after they have registered, we do it via the Membership record; be sure to add the date registered for the workshop

6. When (i.e. Schedule of Tasks)

The busiest time for the committee is March/April/May when most of the workshop registrations are processed. There are ongoing tasks throughout the year and the emails/database need to be continually monitored to ensure updates are applied and questions answered.

January	
Review Potentials in order to keep or remove from next year's database	Chair with input from other Committee Members
Register Half Term New Members	Chair Assigns to Committee Members
Recruit new Volunteers for Committees	Volunteer Co-Ordinator
February	
Configure database for next year	Database Manager
Provide treasurer with budget for following year	Chair
March	
Process entries of Spring Lunch	Assigned to Committee Member
Database training for new Committee Members	Database Manager
Email Potentials re Spring Talks	Chair
Email members re Registration starting	Chair (via Communications)
Enter data for Volunteer Lunch/Facilitator Forum	Assigned to Committee Member
Email Facilitators re Fee Waivers	Chair
Enter workshop data from Curriculum Committee	Chair
Email Facilitators re number of workshop participants wanted in their workshop	Chair
Collaborate with Communications to ensure registration is set up and email sent	Chair
April	
Email Potential Members re registration	Chair
Activate registration	Database Manager
Process Registrations	Chair Assigns to Committee Members
Send Welcome Note to new members and ask for bio	Volunteer Co-Ordinator
Print Name Badges for Spring Lunch	Assigned to Committee Member
Provide Registration totals to Board	Chair
Send membership a reminder to register before randomization	Chair
Send Communications a list of New and Returning Members	Chair (via Communications Committee)
May	
Randomization of oversubscribed workshops	Database Manager with help from assigned Committee member
Contact those on waitlists	After Randomization Committee members contact whoever is on a wait list from the 50, they have registered. (We encourage them to register for another workshop or

	they can remain on the list if they want too. We have to note their choices on their membership record.)
Send Confirmation letters to those registered	Committee member who processed registration
Send out email to all members that confirmation letters have been sent and who to contact if not received	Chair
Continue to process registration and fees	Chair Assigns to Committee Members
Provide Registration totals to Board	Chair
Provide Preliminary Class Lists to Facilitators (letting them know they will get updated lists)	Chair
Contact those who have not registered and also potentials to remind them	Chair
June	
Report for AGM	Chair
Update changes in Board and Committees on database after AGM	Volunteer Co-Ordinator
Provide Registration totals to Board	Chair
July/August	
Continue to review registrations	Chair Assigns to Committee Members
On July 1 st check places being held for new members and inform people on waitlist and facilitators of any freed-up spaces	Chair
Provide Registration totals to Board	Chair
Send email indicating members may now register for a 4 th workshop	Chair (via Communications)
Update Communications on New Member's emails	Chair
September	
Email Facilitators class lists and waitlists	Chair
Prepare labels for workshop folders in classroom boxes. Set up boxes in classrooms with attendance sheets	Chair
Prepare Membership Directory for Board Members: Distribute at Board Meeting	Database Manager and Chair
Send Welcome note to new members	Volunteer Co-Ordinator
Update Communications on New Member's emails	Chair
Provide Registration totals to Board	Chair
Welcome New members (at 1 st Forum or New Members Event)	VC plus two Committee Members
October	
Move those who did not renew from previous year to potentials	
Send Invitations to potentials to become Associate Members	Chair
November	
Present changes to Academy Handbook for Board Approval	Chair
December	
Enter and process registrants for Holiday Lunch and print badges	Chair Assigns to Committee Member
Contact facilitators with waitlists re accommodating more for next term	Chair
Setup Database for half term registration for January	Database Manager

Send email to potentials and members regarding half term registration starting in January	Chair
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5. Interactions with other Committees/Groups

a. Board

- i. Provide updates on membership numbers
- ii. Changes to procedures/manual
- iii. Other business requiring board approval

b. Curriculum

- i. Enter their list of workshops and revise as required (e.g. Maximum numbers)

c. Communications

- i. Provide email list and ongoing updates
- ii. Submit emails as required
- iii. Provide web updates as required (e.g. Workshop availability)

d. Special Events

- i. Register members for lunch (and potentially New Members event)
- ii. Provide labels and lists

e. Facilitators

- i. Provide class lists, attendance lists
- ii. Ensure they provide updates on withdrawals

6. Annual Budget

Our typical annual budget for the Membership Committee includes:

- FileMaker annual fee (\$490 for 2 years in 2018)
- Datatrium Fee: \$850 in 2018
- Ink, Badges for events: typically, \$100 per year