I. OBJECTIVES AND RESPONSIBILITIES

The Membership Resource Directory Manager is responsible for uploading the Houston Chapter Membership Roster to the YM site.

I. ORGANIZATION

The Membership Resource Directory Manager is appointed by the Vice President of Membership. The manager reports directly to the Vice President.

II. GUIDELINES

- Meet with former manager to obtain records and discuss duties and responsibilities.
- Prepare the objectives, goals and budget for the year.
- Appoint additional committee members as necessary.
- Manage the functions of the committee.
- Submit status reports and recommendations to the Vice President for reporting to the Board of Directors.
- Attend the monthly Board of Directors meetings as necessary.
- Read and become familiar with the Constitution and Bylaws.

III. PROCEDURES

Roster Update

- Obtain Houston Chapter Membership Roster from VP of Membership.
- Make a duplicate copy of the spreadsheet containing the original roster and title the tab - New Roster
- Insert a column in front of column A and title Member Type Code and enter/drag SMem for all members in this field
- Cut and insert/paste Original Join Date column to the last column on the sheet
- The following columns need to be moved into this order
  - Member Type Code
  - Last Name
  - First Name
  - Middle Name
  - Member ID (Change to title Constituent ID)
• After Constituent ID add a column and title its Member Approved and drag a Y all the way down the column for all members
• The next column should be Expiration Date and the title needs to be changed to Date Membership Expires
• The column for Current Join Date goes next and the title needs to be changed to Date Last Renewed
• A column needs to be added and titled Membership Expires then drag Yes down the column for all members
• After the Membership Expires column, the following columns should follow:
  o Email Address
  o Company Name (title needs to be changed to Employer Name)
  o Job Title (title needs to be changed to Professional Title)
  o Address Line1 (title needs to be changed to Employer Address Line 1)
  o Address Line 2 (combine with Address Line3)
  o City (title needs to be changed to Employer City)
  o State/Province (title needs to be changed to Employer Location)
  o Postal Code (title needs to be changed to Employer Postal Code)
  o Country (title needs to be changed to Employer Country)
  o Telephone
    ▪ This column needs to be split into 2 columns: Employer Phone Area Code & Employer Phone – I do this by converting text to columns on the Data tab in Excel
  o Fax
    ▪ This column needs to be split into 2 columns: Employer Fax Area Code & Employer Fax – I do this by converting text to columns on the Data tab in Excel
  o Add a column for ARMA Int’l Update and drag Yes down the column
  o Delete the following columns from the spreadsheet:
    ▪ Do Not Bulk Postal Mail
    ▪ Do Not Bulk Email
    ▪ Do Not Call
    ▪ Do Not Fax
  o The Original Join Date should be the last column

Roster Upload to YM:
VP MEMBERSHIP - MEMBERSHIP RESOURCE DIRECTORY

- Once logged into YM, in the left-hand corner click on Support
- Click Support Home then Contact Support
- Fill in the blanks:
  - Subject: Membership Database Update
  - Help us better understand your request: Good morning, attached is our database update. Select the sheet name “NEW”. Please let me know if there are any errors or exceptions via email. Thanks!
  - Product Area: Member Management
  - Your Name and Phone Number
  - Attachments: Drag attachment in the section “Add file or drop files here”
- Click Submit once document is attached Create Monthly Report and upload to website by Monday at noon prior to BOD meeting on the second Tuesday of the month.
- Report any errors that may occur during the upload to the VP of Membership.
- Inform Bi-Weekly Newsletter steward when the upload is completed and all errors have been corrected.

IV. FINANCIAL

All funds received from an ARMA Houston Chapter-sponsored event or project should be turned in to the ARMA Houston Chapter Treasurer for handling. Under no circumstances are ARMA Houston Chapter VP’s, Committee Managers, or Committee Members authorized to split, disburse, or retain monies for expenses incurred out of the funds collected from an ARMA Houston Chapter-sponsored event or project. The ARMA Houston Chapter Treasurer, upon the presentation of a completed check request form and receipt, should pay all expenses from an ARMA Houston Chapter-sponsored event or project.

V. TIMELINE OF EVENTS

The Houston Chapter Roster should be upload to the YM site monthly.

VII. ATTACHMENTS

None