

Operations Manual for Membership Coordinator

There are main roles for the Membership Coordinator:

1. Maintain an accurate accounting of IRP members and dues received;
2. Create mailing labels for the fall and spring mailings;
3. Maintain emails for members as well as those that have expressed interest in IRP;
4. Promote upcoming IRP programs;
5. Work with staff at Salisbury University to update the IRP website as needed.

Maintain Accurate IRP Membership List

The Membership Coordinator works with the treasurer and another board member (the Membership Committee) to maintain an accurate accounting of IRP members and dues received, as well as promoting upcoming speakers. An excel database has been created to simplify this process of managing the list of members. The busiest time for this work is in the fall as the new IRP year is starting.

Membership Application -- Each year by July, the IRP membership application should be reviewed and updated as needed.

The Excel Database --The advantage of using an excel database is that the information is easily maintained from year to year, counts of paid members is easy to assess and you can create mailing labels from this information. The excel database contains member name, address, email and phone numbers. It is carried from one year to the next so that member information does not need to be re-entered each year. Each year a column for the current year is added to indicate "Y" if the member has paid for that year as shown below.

Paid 16-17	Paid 17-18	Last Name	First Name	Street Address	City	Phone	Email
	Y	Smith	John Q	123 Sesame St	Salisbury, MD 21801	555-555-1234	johngsmith@email.com

When a membership application is received, the information in the excel database should be updated as needed. If an application is received from someone who has previously been a member, you can search for the person in the database. Review the address and contact information and update as needed. If they have paid their annual dues, put a "Y" in the Paid column. If the application is for a new member, go to the bottom of the names in excel and enter the new member information. The database has been formatted so that the column headers remain visible as you scroll down the page.

If a request for information is received from Salisbury University or other source from someone requesting information about IRP, this person's contact information is entered into the database. Information about IRP including a membership application is sent to the person and they will receive future mailings about IRP as well.

Mailing Labels

Each August, a mailing is sent to all on the IRP mailing list with a cover letter from the board President, membership application and the listing of the fall speaker program. It is preferred to send only one letter to each address in the mailing list, so the first step in creating the mailing labels is to sort the excel database by street address, then last name, first name. The sorted database is copied to a separate worksheet in excel so it can be deduplicated. The columns for "Paid", "Phone" and "Email" can be deleted because this information is not needed for mailing labels. In scrolling through the list, it is easy to identify those addresses with more than one person. The first name of the record to be deleted is added to the one that is kept.

Example of deduplicating the database prior to creating mailing labels:

Last Name	First Name	Street Address	City
Smith	John Q	123 Sesame St	Salisbury, MD 21801
Smith	Jane	123 Sesame St	Salisbury, MD 21801

The second entry for 123 Sesame St can be deleted and the name of that person included with the first.

Last Name	First Name	Street Address	City
Smith	John Q & Jane	123 Sesame St	Salisbury, MD 21801

When this list is ready, save the file. Open Word and use mailmerge to create mailing labels.

For the spring mailing, if it is only going to paid IRP members, sort and select only those records of paid IRP members before following the above process to create mailing labels.

Maintain Email List

About 50-60% of IRP members and those who have expressed interest in IRP have an email address. When information is received from a member or potential member, in addition to updating the Master Membership list, the email should be added to the IRP Gmail account. All emails entered into the IRP Gmail account are added to the group "IRP" to make it easy to create the weekly emails. Instructions for accessing and using the Gmail account are attached.

Promote Upcoming IRP Programs

Weekly Emails -- Each Sunday during the regular semester when IRP programs are held, an email is sent to all contacts with emails announcing the weekly program. Additional announcements may also be included in the email as needed (club activities, reminders about the luncheons, etc.). All emails contain the following information:

IRP programs are held at the MAC Center, 909 Progress Circle, Salisbury MD at 2 pm. For more information about the upcoming Speaker Program, please see the website at: <http://www.salisbury.edu/irp/speaker-schedule.html>.

We hope you will join us.

When sending the weekly email, use “BCC” for the “TO” list so that there is not a long list of email addresses at the top of the message. Anyone replying to the group email will only send an email to the IRP Gmail account.

Weekly Eventful Listing -- Each week an announcement is posted in the Daily Times about upcoming speaker sessions. One needs to sign-up to be able to post an event on the site. The web address for the site is http://eventful.com/salisbury_md/events. In the title of the event put “Institute for Retired Persons (IRP) plus the date of the event. (e.g., Institute for Retired Persons (IRP) November 6, 2018). The date is required here so that the event is seen as a different one from previous ones.

These postings can be created in advance and will be published on Sunday of each week. In the description of the event the following information is included after the speaker information:

For more information about the upcoming Speaker Program and information about joining IRP, please see the website at: <http://www.salisbury.edu/irp/>. We hope you will join us.

Updating Salisbury University Website

The membership application and Speaker Program are posted on the Salisbury University website (www.salisbury.edu/IRP). This information needs to be updated each time that it changes—at least annually for the membership application and each fall and spring for the Speaker Program. The contact at SU for updating the website is Andrew Coulbourne (AJCoulbourne@salisbury.edu) and his supervisor, Todd Smith (TVSmith@salisbury.edu). The documents to be posted should be converted to PDF prior to sending to SU.