

How Do I...

An Occasional Series

How Does the Membership Secretary Do His or Her Job?

Introduction:

The volunteer position of Membership Secretary evolved as the solution to the age-old question – How can I get club members involved in the operation of their club without driving the volunteers to burn out?

In the distant past the Club Treasurer wore two hats, handled the club's money, and also maintained the membership records. In more recent times the Club Secretary has been known to concurrently wear a fedora and a tam-o-shanter doing double-duty with maintain meeting records and membership records. Now we have one person in each of those three roles. All three have a full plate when it comes to their duties.

Whereas most club leadership positions run on a calendar year basis, January through December, the Membership Secretary tour of duty begins on the date of the November Monthly Meeting and runs through the following year's November Meeting. This allows sufficient "ramp up" time to transition duties and be ready for the January onslaught of dues payments.

The remainder of this document describes the **Events** that occur in the business life of our Membership Secretary, the **Processes** that he or she uses to manage those events, and key elements of delivering great **Customer Service** results.

Catch 'ya on the air,
Andrew Forsyth AF3I

Day to Day Activities of the Membership Secretary:

The Cumberland Amateur Radio Club has good visibility in the community. We attract the interest of people who wish to learn more about the ham radio hobby. And, we provide a sizable pool of knowledge to those who have questions. That makes CARC “One of the best ham radio clubs you are likely to find”.

Interested parties who may become potential members often contact the Membership Secretary with their questions or membership application.

A listing of the routine activities typically performed by the Membership Secretary looks like this:

Num	Event	Process
1	Receive a “cold inquiry” regarding club membership.	Acknowledge receipt of the inquiry. In the acknowledgement mention our next actions if additional time is needed. Reply if the answer is known and in-scope for the Membership Secretary Escalate to other club leaders if the answer needs their additional insights. Follow-up, if appropriate.
2	Receive an inquiry on a topic unrelated to club membership. (This sometimes happens if the correspondent uses any available eMail address and happens to select the “Membership” address.)	If this appears to be a legitimate inquiry: Acknowledge receipt of the inquiry. In the acknowledgement mention our next actions. Escalate to other club leaders who have the needed insights. <hr/> If the inquiry appears to be malicious, spam or otherwise unwanted: Preserve the inquiry in case it is needed for research purposes. Notify the webmaster who may be able to block the unwanted traffic.

3	Receive a Membership Application from someone unknown to us.	<p>Review the application and perform due diligence such as call sign, name, and address verification.</p> <p>Acknowledge receipt and respond to the applicant.</p> <p>Describe the membership requirement of sponsorship by a Full Member.</p> <p>Invite the membership candidate to attend a CARC meeting and get connected with a potential sponsor.</p>								
4	Receive a Membership Application from a person who is known to us.	<p>Review the application and perform due diligence such as call sign, name, and address verification</p> <p>Check the application for completeness.</p> <p>If incomplete: Request the applicant provide a complete application.</p> <p>If complete: Share a copy of the application with the Club President and Vice-President.</p> <p>Request a slot in the next meeting agenda for presenting the individual and highlights of his/her application for consideration.</p> <p>Acknowledge receipt of the application. In the acknowledgement mention our next actions such as getting on the agenda, presenting highlights of the applicant's information, motion to elect the candidate as a member, voting.</p>								
5	Ensure the applicant is presented as part of the next meeting.	<p>If possible, have the Sponsor introduce and speak about the candidate.</p> <p>Motion to elected the candidate as a member of CARC. Second. Vote – Show of hands, or Secret Ballot. Congratulations.</p>								
6	Collect Current Year Membership Dues, if applicable	<p>If the new member is subject to dues, notify the member and describe the process, amount, and payment options.</p> <p>Allow for prorated dues for members elected in the later months of the year.</p> <table><tr><td>Jan, Feb, Mar, Apr</td><td>Pay 100%</td></tr><tr><td>May, Jun, Jul</td><td>Pay 75%</td></tr><tr><td>Aug, Sep, Oct</td><td>Pay 50%</td></tr><tr><td>Nov, Dec</td><td>Pay 0%</td></tr></table>	Jan, Feb, Mar, Apr	Pay 100%	May, Jun, Jul	Pay 75%	Aug, Sep, Oct	Pay 50%	Nov, Dec	Pay 0%
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Nov, Dec	Pay 0%									

7	Issue a Membership Card	<p>Personalize and print the membership card.</p> <p>Options:</p> <ul style="list-style-type: none"> a.) Anticipate that the candidate will be elected. Bring a membership card to the meeting . b.) e-Mail a front and back image of the card and promise a printed card. c.) Deliver a printed card, in person, at the next meeting. d.) Mail the printed card to the member's home address.
8	Produce a Welcome Letter and New Member Information Packet (Note: In the past, the Club President performed these activities.)	<p>Contents:</p> <ul style="list-style-type: none"> Welcome Letter Club Constitution and By-Laws Club Roster updated with the new member info. Calendar of Club Meetings and Event Dates Introduction to Groups.io site Introduction to Club Website Member Area Collectible Memento Booklet (optional) Million Dollar Bill (optional) Ham Radio Zone. Turn off Blasting Equipment. (optional) <p>Options:</p> <ul style="list-style-type: none"> a.) Anticipate that the candidate will be elected. Bring a membership packet to the meeting. b.) Deliver the packet at the next meeting, in person. c.) Mail the packet to the member's home address.
9	Update the Membership Secretary's records.	(Richard Johnson – please say a few words about the process you use and file names that you would share with the next Membership Secretary.)
10	Notify other club leaders to update their records.	<p>e-Mail contacts</p> <p>Club Roster document, updated</p> <p>Includes: In Case of Emergency listing</p> <p>Meeting Agenda template – Participant / Attendee</p> <p>Contest Administrator – N3FJP Club Score Processor</p>
11	Apply dues payments received to the club account.	Coordinate with the Club Treasurer for specific details of a Best Practice -- how and when to handle the funds.

Annual Activities of the Membership Secretary:

Each year in January, club members are asked to renew their membership and pay dues. In return, the member will be issued a new membership card. The Membership Secretary handles those activities.

Num	Event	Process
1	Prepare one's self for the onslaught.	Materials on-hand: Forms, Files, Folders, Workflow, Envelopes, Postage, Membership Card Stock, Small Bills for making cash change, Receipt Book.
2	Coordinate with other Club Leaders who have a stake in the process.	Treasurer – Handling and Reporting of Funds. Andrew Forsyth – Availability of Square Payment Processing.
3	Get into the Monthly Meeting Agenda with anything you wish to share.	Published 10 Days prior to the November Meeting Who, What, Where, When, Why, hoW much.
4	Get into the Club Website with anything you wish to share.	Align on 10 Days prior to the November Meeting See above.
5	Receive payment in-person at a club meeting	Accept Cash. Exact change appreciated. Issue a receipt for payment Or, issue a Membership Card as proof of payment. Accept Check payable to Cumberland Amateur Radio Club. Direct the member to Andrew Forsyth who can accept a Square Payment on behalf of the club using Mag Stripe or Chip Card.
6	Receive payment by mail	Discourage Cash. If it shows up, take it. Accept Check payable to Cumberland Amateur Radio Club.
7	Initiate payment processing via SQUARE payment processing	Direct the member to contact Andrew Forsyth in person or via AF3I@RadioClub-CARC.com and provide the eMail address at which he or she wishes to receive the CARC Invoice. AF3I will generate a Square Payment invoice customized with CARC logo and membership terminology. Upon receipt of the eMail, our Member should perform due diligence. e.g. Am I expecting this invoice from Andrew Forsyth? If not – Do Not Pay. Member opens eMail and performs additional due diligence. e.g. Is the amount what I expect to pay (\$10 dues + \$1 convenience fee) If all is well, Member clicks the PAY INVOICE link, provides payment card info, and submits the payment.

8	<p>Reconciliation of SQUARE Payments Invoice</p> <p>Notes regarding Square Payment Processing Fees appear later in this document.</p>	<p>After our CARC Member submits his or her payment via the Square Payment Invoice process</p> <p>AF3I receives payment notification from Square – next day.</p> <p>AF3I receives net funds in his bank – second day.</p> <p>AF3I notifies Membership Secretary and Treasurer of completion. The notification includes the Member Name/Call Sign, Gross Amount Paid, and Net Amount of the processed payment.</p> <p>AF3I arranges to transfer the net proceeds of the transaction to the club treasury and copies the Membership Secretary.</p> <p>Upon receipt and verifications of the funds, the Treasurer notifies the Membership Secretary.</p> <p>Membership Secretary updates records.</p>
9	Generate / Print a Personalized Membership Card	
10	Update Membership Secretary's records	(Richard Johnson – please say a few words about the process you use and file names that you would share with the next Membership Secretary.)
11	Apply payments received to the club account.	Coordinate with the Club Treasurer for specific details of a Best Practice -- how and when to handle the funds.
12	Distribute Membership Cards to PAID members.	<p>For consideration:</p> <p>Is “this member” likely to be in attendance?</p> <p>If necessary, mail the membership card to our member.</p> <p>Alternate arrangements:</p> <p>eMail an image of the card front and back to our member as a temporary membership card.</p>
13	Membership Dues Accounts not paid as of March 31 are considered to be delinquent.	<p>Filter the list of delinquent accounts to remove any special accounts that may have slipped through the cracks:</p> <ul style="list-style-type: none"> First Year Free Membership Lifetime Free Membership Paid multiple years in advance <p>Report delinquent accounts to the Club President and optionally to other club leaders for their review and recommendations.</p>

14	<p>Notify members whose dues account is in arrears and request their response.</p> <p>Note: In the past, the Club President initiated this mailing with response envelopes pre-addressed to the Membership Secretary.</p>	<p>Materials:</p> <p>Outgoing Envelope Personalized "Form Letter". Response Index Card with check box options. Response Stamped, Addressed Envelope.</p> <p>Typical response options:</p> <p>Sorry to be late. Here is my payment. I should have qualified for First Year Free. I should have qualified for Lifetime Free Please recheck your records. I swear that I paid. I have decided to not renew my membership.</p> <p>** Not openly mentioned... I am having hardship. Could someone sponsor me?</p>
15	Notify other club leaders to update their records.	

** Perhaps we could think like the Public TV and Radio Stations and have a MEMBER MATCH FUND. We would ask those who are able to add \$1 to their dues payment to support the fund. Then, we would have a starting point from which to honor this type of request.

Sample Form Letter for Delinquent Accounts

Cumberland Amateur Radio Club
Richard Johnson
45 S Pin Oak Drive
Boiling Springs, PA 17007-9407

July 1, 2021

SAMPLE NAME
SAMPLE ADDRESS
SAMPLE CITY, STATE ZIPCODE

Dear NAME,

Let me get right to the point --- We've missed you.

Each year in January members of the Cumberland Amateur Radio Club are asked to renew their membership and make a dues payment (currently \$10). Our Membership Secretary mentioned to me that your 2021 renewal instructions have not yet arrived.

I hope you are able to make good use of the benefits CARC offers as part of your annual membership.

- Club web site --- www.RadioClub-CARC.com --- contains a News Blog, Calendar of Events, Photos of CARC Activities, Resources where you will find the *How Do I...?* series of articles, Member Page where you will find Meeting Agendas, Meeting Minutes, Membership Roster and other information of interest to Club Members. Your membership card contains the password to this part of the website.
- Social Media – www.facebook.com/K3IEC and www.twitter.com/k3ieccarc
- Weekly On-The-Air 10 Meter Net. Wednesday evenings (except Club Meeting Night) at 8 p.m. local time. 28.400 MHz Upper Sideband. Net Control Station Garry K3EYK.
- Weekly On-The-Air 2 Meter Net. Sunday evenings at 7 p.m. local time. 146.490 MHz FM Simplex. Net Control Station Frank KB3PQT.
- Monthly Face-To-Face meetings (will resume at Hoss's July 21, 2021) where CARC Members gather to share conversation and tell about their ham radio activities. Details are on the web site.
- ARRL Field Day Operations the fourth weekend of June, as K3IEC.
- Pennsylvania QSO Party, Multi-Operator, Multi-Transmitter Portable Operations.

I hope you will continue to support your club by renewing your CARC membership. The accompanying addressed envelope is for your convenience. Please return the enclosed Membership Renewal Reply card with your dues payment. Upon receipt, Membership Secretary, Richard Johnson, N3EPY, will promptly issue a CARC Membership Card personalized with your Name and Call Sign. If our information is not up-to-date please make corrections on the card. (See the back side of the card.)

Thank you for being a member of the Cumberland Amateur Radio Club. If you have questions, comments or concerns please let me know. AF3I@RadioClub-CARC.com

73,

Andrew Forsyth AF3I
Club President

4 x 6 inch Index Card



- ☐ I would like to renew my Annual Membership for 2021.
My \$10 dues payment is enclosed.
- ☐ I would like to pre-pay my dues for _____ additional years.
My payment of \$10/year is enclosed.
- ☐ I do not wish to renew my membership at this time.
- ☐ I believe I previously pre-paid my dues for additional years.
- ☐ I believe I already renewed my 2021 membership. Please re-check your records.
(Note: If you have details, please let us know.)

Please return this card to the CARC Membership Secretary
in the accompanying Self-Addressed Stamped Envelope

From: Andrew Forsyth, 5 Northern Dancer Dr, Dillsburg, PA 17019-9300

[illegible]

This area is for any correspondence you wish to send to CARC:

Sample SQUARE Payment Invoice

Page 1 of 2

Andrew Forsyth

From: "Cumberland Amateur Radio Club" <invoicing@messaging.squareup.com>
Date: Sunday, May 26, 2019 9:03 PM
To: <af3i@radioclub-carc.com>
Subject: New Invoice: #000002 from Cumberland Amateur Radio Club



Cumberland Amateur Radio Club

New Invoice

\$11.00 due on June 25, 2019

[Pay Invoice](#)

Invoice - CARC Membership Renewal for Calendar Year
2020

Invoice #000002
May 26, 2019

Bill To

Andrew Forsyth
af3i@radioclub-carc.com

Everything is awesome when you are part of the Team.

CARC Annual Membership	\$10.00
Cumberland Amateur Radio Club Annual Membership	

Convenience Fee	\$1.00
Offsets the cost of electronic payment processing.	

5/28/2019

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Subtotal	\$11.00
Total Due	\$11.00

Attachments

Sample_CARC_Renewal_2020.pdf

[View Attachments](#)

Cumberland Amateur Radio Club

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Notes Regarding Square Payment Processing Fees

Payments making use of the Square eMailed Invoice option:

Example of Square eMailed Invoice (expanded format)

We pay a fixed fee of thirty cents plus a percentage (currently 2.90%) of the gross payment amount.

A typical one-year membership renewal looks like this:

\$10.00 Dues Paid

\$ 1.00 Convenience Fee for use of Square

\$11.00 Paid by Member

-\$0.30 Fixed fee paid to Square

-\$0.32 Percentage fee paid to Square.

\$10.38 funded to Andrew Forsyth's bank account

-\$0.00 No fees tacked on by Andrew Forsyth

\$10.38 funded to CARC by Andrew Forsyth

In-Person Payments making use of Tap, Chip, or Mag Stripe card entry methods:

We pay a fixed fee of ten cents plus a percentage (currently 2.60%) of the gross payment amount.

Gross Amount \$11.00 - \$0.10 – \$0.29 = Net Amount \$10.61

Payments making use of Manually Keyed-In card entry methods:

We pay a fixed fee of fifteen cents plus a percentage (currently 3.5%) of the gross payment amount.

Gross Amount \$11.00 - \$0.15 – \$0.39 = Net Amount \$10.46

Excerpt from our updated Constitution and By-Laws (work-in-progress 2021/2022)

This section describes the duties of Club Officers

Section 7.5 Membership Secretary.

The Membership Secretary shall keep a membership roster; receive and present applications for membership; collect membership dues, issue membership credentials upon acceptance of an applicant into membership, issue or update membership credentials upon receipt of a member's dues payment, provide an accounting for and remit the received funds to the Treasurer, keep an accurate list of dues-paying members; shall notify those whose annual dues payment is delinquent in accordance with provisions of the Constitution & By-Laws. He shall, at the expiration of his term of office, transfer all Club records in his possession or under his control to his successor.