

# EGLIN YACHT CLUB MEMBERSHIP CONTINUITY PLAN

The purpose of this document is to provide a basic overview of the essential information needed to allow continued operation of certain functions and for a transition to a new responsible person or persons. This document covers the five major tasks that are currently being performed by Bob Gramm.

## **1. Maintain the Master Membership Roster**

## **2. Update and Print ID Cards**

## **3. Collect Annual Dues**

## **4. Order and Pick-up Name Tags**

## **5. Process New Members**

## **1. Maintain the Master Membership Roster**

- a. Maintain a spreadsheet file with several sub-sheets to allow reporting of various EYC membership information:
- b. Provide Monthly Status Reports to EYC Advisory Council Members including list of new and departed members.
- c. Provide list of members owning boats (including boat names and registration numbers) to the Club Manager and Boating Activities/Cruise Director when changes occur. Send email to members every couple of years requesting they update/confirm the data for their boats.
- d. Provide voter verification list for the Advisory Council annual elections.
- e. Provide membership Rosters to any members requesting them.
- f. Provide Dive Flight with latest Diver Status Report and any new ID Cards on 1st and 3rd Fridays.
- g. Maintain checklist for completing new member ID Cards, welcoming emails, and name tag purchases to include status of purchase authorizations from 96FSS/FSW.
- h. Provide a list of resigned or terminated memberships to the Advisory Council in January of each year. Remove associated name tags from the board and retain them in a ziplock bag along with the list.
- i. Create/maintain spreadsheet functions/algorithms to track different situations such as the following sub-sheets to include status of annual member dues payments, email address list, and mailing address list.
- j. I use the Apple Numbers spreadsheet application; but, have also exported the file to the Microsoft Excel application.

## **2. Update and Print ID Cards**

- a. Obtain copy of the Commodore's signature, scan it as a .jpeg file, use a photo editor to enhance the image, then insert it into the ID Card print form.
- b. Change the date on the print form to the new Fiscal Year.
- c. Print the cards on Avery 28877 Business Cards (10 cards per sheet).
- d. I use the Apple Pages application; but, have saved the ID Card print form in Microsoft Word format. A sample .pdf file is at attachment 1. Do not print from a .pdf file, use either Pages or Word (the .pdf does not print cards consistently, at least on my Brother printer).

## **3. Collect Annual Dues**

- a. Send out the first dues collection email prior to the September membership meeting. Sample (attachment 2).
- b. Send out reminder emails in October, November and December. Never send a reminder email to those who have already paid. Sample (attachment 3).
- c. Send out final reminder/termination emails no later than January after all reasonable efforts have been made to contact the members. Sample (attachment 4).
- d. Obtain volunteers from the Advisory Council to assist you in collecting dues at the September Membership meeting and both October meetings.
- e. Check the P.O. Box 1735 at the base Post Office (across the street from the Personnel Support Center) weekly during October and November, then monthly thereafter.
- f. Issue an EYC ID Card to each person that pays their dues and record the date to be entered later into the Roster spreadsheet. Provide money collected to the Financial Manager taking care to identify members who paid with cash.
- g. Coordinate frequently with the Financial Manager to ensure the Roster agrees with the financial inputs. Also coordinate frequently with the EYC Webmaster to ensure that resigning members are removed from his email address list and the Online Roster.

#### **4. Order and Pick-up Name Tags**

- a. Request the Commodore obtain authorization to purchase blocks of name tags (usually 10 or 20) from the Community Services Flight Chief, 96FSS/FSW.
- b. Order name tags from the Trophy Center, Inc., 529 Eglin Pkwy NE, Fort Walton Beach, FL 32547, 850-862-8413, [awards@trophy-center.com](mailto:awards@trophy-center.com). The current cost is \$9.00 per tag.
- c. Info Ashley Smith, 96 FSS/FSR, 850-883-0957, [ashley.smith.53@us.af.mil](mailto:ashley.smith.53@us.af.mil), who pays the Trophy Center upon receipt of their invoice. Also info the Commodore and Financial Manager. See sample email (attachment 5).
- d. Check the spelling when picking up the name tags, then place them on the board in the clubhouse.

#### **5. Process New Members**

- a. Check the applications for missing info and contact the new member to update.
- b. Provide any dues collected to the Financial Manager.
- c. Issue an ID Card upon receipt of dues and membership applications. If dues and applications are received by someone else, provide the ID Card of divers to the Dive Flight Renter on duty on Fridays. For boaters, place the ID Card on the board with the new name tag. Mail the ID Cards to those who request it.
- d. Enter Application data into Master Membership Roster.
- e. Send an EYC welcoming email to each new member that includes a letter explaining the workings of the club, our website, the scheduled get-togethers, and combinations of the various locks for ice and dock cart, etc. The letter also highlights section 9 of the EYC OI 34-49 which outlines the members' responsibilities. Info the EYC Webmaster so he can obtain photos for the Online Roster and provide the password to the Roster. See sample email and letter (attachment 6).
- f. Order and pick-up the new name tags
- g. Introduce/welcome new members, if present, to the membership at the monthly membership meeting.