



## Membership—Record-keeping Hints for 2016-17

Presented by Susannah Baxendale, Director of Membership

- Make an Excel file for your raw data. Save it with a file name that includes a short version of your school's name, membership and the school year, and raw data: for example, CCHS membership 2016-17 raw data. Internally make a header for the file with the same title.
- Title the columns as follows (the order doesn't matter since you pick the columns to sort by): first name, last name, street address, city and zip, date joined, amount paid, donation, phone number, email, student name. **NOTE: If you plan to print out mailing labels, enter the fields as you would need to for the labels.** If you are just entering data for sorting and list purposes, separating the fields won't matter so much so you could combine city and zip for example.
- Using the membership envelopes or the membership flyers, enter the data from the envelopes or flyers (the order doesn't matter). The first set of data you enter might be quite large. After that, your subsequent batches will be smaller.
- Once you have the first batch entered and saved, *make a new document* by opening the raw data file, clicking on "save as" and make a file name that includes the short version of your school's name, membership as of the date you entered the raw data. For example, CCHS membership as of 16 Sept 2016. Be sure to put the same title in the header). Then sort the new document by last name so that you have a list that is easy to consult. This is your copy to print out in landscape mode.
- Now do a 'save as' of your sorted file and add the words "for Rec Sec". Make sure the internal header reflects the new file name. Delete all columns except the first and last names, street address, student name and date joined. The secretary doesn't need to know about donations, amounts, phone numbers, etc. The president gets a copy of this shortened list as well.
- Each time you do data entry of memberships, open up the "Raw data" file, go to the end of the entries and type in "batch as of (and put the date you entered the data)". Then do data entry as before in the order they come. Block and copy the new batch data and save in a new file (named as of the date you did the new smaller batch). For your use, sort alphabetically and print. Make a file for the secretary as you did before. Like you, the secretary will ultimately have to look at several lists, but that is better than printing out an ever longer list over and over.

If Excel is not your strong point, do you know someone who could do this job for you? This is an excellent opportunity for someone to help support PTA. If you can't do Excel and you don't have anyone to help, think of the membership envelopes or membership flyers like giant file cards and sort them manually into alphabetical order. Then type up each batch of names and basic information that the recording secretary needs: first and last name, street address, student name and date joined. You will keep the envelopes or flyers as your full reference source. As you get new batches of memberships, **don't retype your list!** Instead make a new list in alphabetical order (put the date that you typed it up) and print it out for the secretary. You and the secretary will have several lists to check but they'll be in ABC order and easy to consult!