

Procedure for SHINE Membership Secretary

August 2004

The Membership Secretary is responsible for –

1. Membership renewals & maintaining the membership database
2. Sending information to prospective members & dealing with new members
3. Confirming that applicants to join lis-shine are members of SHINE
4. Compiling & sending out voting papers

Membership renewal notices

- 1) Membership runs from April 1st to March 31st.
- 2) Renewal notices should be sent out at the end of February. Reminders should be sent out at the beginning of May.
- 3) The renewals notices are generated on-line. Details for this are on the membership admin area on the SHINE website – Membership Area / membership database. Log-in is - user id: shine ; password: shine1*admin
- 4) This section will allow you to manage the annual membership mailshots and invoicing.
Options are shown on the right hand menu, and the usual procedure is as follows:
 - a) On 1st April run the link to archive current membership information and clear the following fields in the database so that they are ready to be re-populated this year:
Library Table - RenewedDate, ChequeReceivedDate, ChequeReceived, InvoiceDate
 - b) Then run the 3 links:
 - a) Generate Members Letters
 - b) Generate Membership Renewal Form
 - c) Generate Membership Invoice
 - c) On receipt of Membership Renewal Forms you can either:
 - a) Where there is a change, update an individual library
 - b) Where there are no changes, update a batch of libraries as having returned their formsBoth of these options will update the Library Table - RenewedDate field
- 5) On receipt of Payment you can either:
 - a) Where there is a change, update an individual library
 - b) Where there are no changes, update a batch of libraries as having paid

- 6) At the follow-up date (chaser) you have two options:
 - a For those libraries where nothing has been returned - select the "Generate Membership Reminder Letter", and select the "Generate the Membership Renewal Forms", and "Generate Membership Invoice"
 - b For those libraries who have returned the Membership Renewal Form, but have not sent payment, select "Generate Invoice Reminder Letter"
- 7) Renewals notice consists of covering letter, membership form and invoice.
- 8) Details from the membership database should be merged into the documents.
- 9) A number of services require a single invoice to cover all libraries (e.g. Napier University, NHS Grampian). This is noted under the 'Invoice notes' field in the 'Library' table. All membership forms for these services should be mailed out under a single invoice.
- 10) Membership forms are returned directly to the membership secretary by the library/member
- 11) Invoices should be sent by the library/member to their finance dept for payment, either by cheque or by BACS. If payment is by BACS a remittance note is sent to the membership secretary by the payee.
- 12) When a cheque is received the member code is noted on the back & it is then sent to the Treasurer for banking.
- 13) The form is filed in order of SHINE code with the receipt date noted on it

Sending information to prospective members & dealing with new members

- 14) Information should be sent out to prospective members in response to enquiries, including info about membership categories (membership categories.doc), and a membership form.
- 15) When a new member form is returned add the details to the database and notify the Journal editor so that a copy of the most recent issue is sent to the new member.
- 16) Send an email to the new member inviting them to join lis-shine. Include a link to the sign-up page in the email

Confirming that applicants to join lis-shine are members of SHINE

- 17) The membership secretary is one of the 'owners' of lis-shine.

- 18) When someone registers on the lis-shine website an email is sent to the 'owners' for confirmation
- 19) The membership secretary checks the membership database.
- 20) If the applicant is a member the application is OK'd.
- 21) If they aren't the membership secretary emails them to confirm their work location.
 - a If they are working at a library with institutional membership, & that library has fewer than 6 individual members the application is approved & their name added to the database.
 - b If they are not the reason for not being approved for lis-shine is explained and a membership form is sent to them if they are eligible to join SHINE.
 - c When the form & subscription is received they can be joined to lis-shine

compiling & sending out voting papers

- 22) Committee elections
 - a Compile voting papers from nomination forms
 - b Send out voting papers to each member
 - c Count votes returned
- 23) Changes to the constitution
 - a Compile voting papers from ?
 - b Send out voting papers
 - c Count votes returned