MEMBERSHIP PROCEDURE

FROM THE FORM CREATION ON THE WEBSITE TO SENDING INFO TO QFHSA and more…

Before starting, make sure you know how to use Microsoft Excel (filters, sorting, formulas, etc.). It will make your job so much easier. Make sure you also have MS Publisher to create the membership certificates. Make sure that you have a user created in Weebly (Website) to extract the membership information entered.

IMPORTANT note: make sure you test all your forms and links before you send them by email or add them in Facebook publications. Even the membership confirmation, get up to the point that you have to pay with Paypal, then cancel before processing.

1. Online Membership form:
   1. Create the new Membership products in the store
      1. Create new membership certificates (Full and Associate)
      2. Save as PDF and as JPEG
      3. Go in the Store and copy Product from last year
      4. Change title of the product and update picture and download file then save
      5. Go in the product category “Membership” and remove products from last year
   2. Create the Web form/page when school finishes
      1. Copy page from last year – then drag from the bottom and bring it on top
      2. Change the page name to update to current school year
      3. Change the form title when clicking in it
      4. Attach the new PDF form on top (should be provided by the H&S president in June)
      5. Update the online form if required
      6. When done, click on Publish
   3. Make a post on our Facebook page (pin it to top until end of September)
   4. Make a blog post on our website
   5. Send email to our membership mailing list from last year – on the first agenda day (August)
2. Membership drives:
   1. Make sure you have enough volunteers on:
      1. Agenda days
      2. Curriculum evenings
   2. Make sure you have enough baked goods (buy some extra in case)
   3. Napkins, plates, Huge water jugs are in our Junior locker in the mini-caf (Mme Guay has the keys)
   4. Prepare a cash box – confirm every amount received by putting your initials when receiving a form with money or cheque
   5. If you have a smart phone, install the SQUARE application then ask the treasurer to give you the Square login and password to enable members to pay their membership with their credit cards on the spot.
   6. Prepare a sheet with our first H&S meeting date, time and location to post on our three fold bristle board
   7. Avoid having forms in the student’s package – it is better to have the forms on our table.
   8. Bookmarks with QR codes were a success, continue if possible
3. Membership entries:
   1. Enter all forms received on the Website, like if you were registering online
   2. Click on Pay – then once in the store, press on the BACK arrow and start with the next one
   3. Note: if you made a mistake, you cannot change the form entry – you will have to do it when you extract the information in MS Excel or delete the entry and redo it
4. Sending Membership info from QFHSA until we send them the list of members:
   1. If we receive any communication from the QFHSA from the beginning of the school year until we send the QFHSA the list of member details, extract the members so far and forward the email to them. ALWAYS put them in BCC
5. Sending members list to QFHSA
   1. A dummy file has been created in which you download the information from the website then it creates the file for the QFHSA.
   2. Copy all information from the QFHSA worksheet into another spreadsheet (values only)
   3. Save and send to the QFHSA with amount of money required: 18$ per full member. Do not do it before mid-October.
   4. This will ensure we are in good standing with the QFHSA
   5. Send updates as you receive them
6. Sending emails to our members list
   1. Email list is used only for general communication or requests (e.g. baking, Westwood newsletter, call-out for volunteers)
   2. Please use ERMS from the school as much as possible

ALL DOCUMENTS FOR THE MEMBERSHIP ARE ON THE ADMISTRATION’S PAGE ON THE WEBSITE

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Date: August 2016

Revision: initial