

**PORTLAND BEAD SOCIETY  
STANDARD OPERATING PROCEDURE  
MEMBERSHIP COORDINATOR**

- The Membership Coordinator, in accordance with the PBS Bylaws shall:
  - Make applications for membership available.
  - Collect and submit membership dues to the Treasurer.
  - Maintain current membership records.
  - Submit a current membership list to the printer, President, Newsletter Publisher, and Newsletter Editor prior to each PBS Newsletter.
  - Provide a current membership list to other Board members as needed.
  - Promptly process and distribute membership cards to active members.
  
- As a Board member, Membership Coordinator shall:
  - Comply with the PBS by-laws.
  - Adhere to the PBS Code of Conduct and to the provisions outlined in the Board-approved modification of the “Internal Revenue Service Good Governance Document”.
  - Write and/or update the Standard Operating Procedure for this position.
  - Prepare an annual budget to be presented at the yearly Budget Meeting. Be responsible for the budget for the position. All over expenditures will be brought to the Board for review and approval. All receipts, invoices and expenditures will be documented in accordance with PBS financial procedures.
  - Attend Board and General Meetings on a regular basis. Arrange for a substitute at these meetings as appropriate.
  
- As a Board member, Membership Coordinator shall maintain and update membership records as follows:
  - Pick up the mail at the post office and sort for distribution to appropriate board members.
  - Process address corrections prior to submitting mailing labels to printer for newsletter/postcard mailing.
  - Sort checks noting on the membership application the check number, date of the check, the date the application was received, and the postmark date.
  - Complete the Record of Deposit form and submit form and all checks and cash to the Treasurer.
  - On the PBS laptop, run the Access database “Add/Edit/View Members”.
  - Set members who are more than 60 days behind renewal as inactive.
  - Add new members.
  - Update database with address corrections.
  - Run the “Renewed Members List” and labels. Save report. Process membership cards.
  - Run the “Overdue Members List” and labels. Save report. Process reminder postcards.
  - Run the mailing list for printer and upload the file to the printer's website on the Friday following the Board Meeting.
  - Run the “Active Member List”. Email copies to board members as needed.
  - Backup the database. Give updated disk to President as soon as available.
  - Send members two reminder postcards. The first reminder goes out in the month a membership expires and the second reminder goes out the following

month if still not renewed. When members are 60 days overdue, set the member's status to "inactive" in the database.

- As a Board member, the Membership Coordinator shall keep all PBS-owned equipment in good working order and inform the Board of any maintenance issues.
- The Membership Coordinator shall maintain a back-up of records as specified in the Records SOP.
- When leaving this Board-appointed position, the membership coordinator shall deliver all documents, materials, and equipment pertaining to the position to the successor within 30 days. All PBS-owned equipment shall be handed off in good working order, to the succeeding officer, including hardware and software.

Adopted by the PBS Board  
November 15, 2011