

**CVHS Membership Team Duties  
Updated as of February 2023**

- 1) Membership Team – refer to the List of Volunteers sent out by President
  - a) Chair(s)
    - i) The Chair position may be shared between two members.
    - ii) Duties of the Chair are provided below.
  - b) Database Manager
    - i) There is one Database Manager. The DbM maintains the Excel membership list for each calendar year; and forwards membership changes to the person maintaining the MailChimp distribution list. The data collected includes: member name, email address, telephone number, home address, whether they purchased an individual or family membership, and, if a family membership is purchased, the name of the partner, and the year that they joined. In addition to the Excel program, the DbM maintains a paper back-up.
  - c) Greeters
    - i) Three or more Greeters are required during meetings. One greeter works with the Chair at the lobby table selling memberships and guest passes. They may hand out membership cards for pick-up. At the same time two Greeters work at the table inside the meeting room checking that participants have current membership cards, asking attendees to sign-in and providing door prize tickets.
  - d) Ambassador(s)
    - i) One or more Ambassadors are required per meeting. Ambassadors help direct the flow of members in the lobby and/or show new members around the venue prior to the meeting to acquaint them with the various tables. (not being done since Covid)
  
- 2) Duties of the Chair
  - a) Annually
    - i) In late August order the following year's membership cards so that they are ready for sale at the October general meeting and online as of October 1. Copy sign-in sheets for the meetings, as required. The CVHS has an account with ABC Printing (301 Puntledge Rd, Courtenay). Typically, 150 membership forms and 500 cards are printed annually. Choose a different colour of card each year. Work with the Board on any revisions that might be required to the membership form and cards.
    - ii) Ask the President to place a notice in the September and October newsletters that the next year's memberships are available as of October 1.
    - iii) At year-end, confirm which members will stand as Membership Team members for the following year. Seek additional members, as required.
    - iv) Write and submit a report for the President after the AGM meeting. The report should include: membership purchases for the year; membership purchases made for the following year; number of attendees per meeting; method of payment for memberships; and membership budget purchases.
    - v) Purchase postage stamps (\$100 at a time), door prize tickets (2 rolls), small (3x6) and letter-sized envelopes, receipt books and other stationery supplies, as required.
    - vi) Note that Membership sold memberships at various events in the past such as Seed Savers and the CVHS Spring Plant sale with limited success. The Board decided to abandon this practice in 2018, but in 2021-22 memberships when the Square was purchased memberships were sold at various public events, eg Open House and Spring Plant Sale.
  - b) Monthly
    - i) Provide a written Membership Report to the President and/or Secretary a few days prior to the Board meeting. Committee Chairs are not required to attend board meetings, but may do so when topics of interest are on the agenda or when requested by the Board. Board meetings occur each month with the exception of July, November and December.
    - ii) Attend monthly general meetings with the Membership Team to sell memberships and guest passes. Meetings occur each month with the exception of July, November and December. Notes about tasks to complete prior to, during and after a general meeting are found below.
    - iii) Provide completed membership forms received at the general meetings to the Data Base Manager. It is best to provide the completed forms to them prior to the general meetings so that they can update the membership and distribution lists prior to the meeting (physical or Zoom).

- iv) Check the membership list to confirm that information forwarded to the Database Manager agrees with the information provided.
  - v) Write a membership note for the e-newsletter and submit it to the President, when requested or when there is information from the Team to relay.
- c) Weekly
- i) Pick up relevant membership mail from the CVHS mailbox #3443. The mailbox is located at the Courtenay Post Office (333 Hunt Place, Courtenay). Pick up the mail as convenient, but typically weekly. The President and Treasurer pick up general mail and banking information.
  - ii) Process membership forms received in the mail. Check that information is complete; record the method of payment. Prepare a receipt and fill out a membership card. In the case of a family membership, fill out a card for each adult in the family. Mail if they have included a self-addressed stamped envelope. If not, place the receipt and card in the card folder that is taken to each general meeting for member pick-up. Provide the paper forms to the Database Manager for input into the database (see 'Monthly').
  - iii) Retrieve online membership orders from SQUARE and E-Transfer. The online process is described below. Process online registration forms. Fill out membership cards and mail them out. Send a copy of the form or a copy of the information to the Data Base Manager.
  - iv) The CVHS Membership email is: membership@comoxvalleyhortsociety.ca (gmail). Respond to emails that are related to membership. The President will forward relevant emails sent to the general email address.

### 3) Prior Preparation for a General Meeting (Physical)

- Process online memberships and go to the post office box just before a meeting to ensure that the membership and distribution list can be updated in time and that membership cards for pick up are available for the meeting.
- Contact the Membership team to ensure that you have at least one ambassador and three greeters for the meeting. If not, seek other members to assist.
- Ensure that you have three up-to-date membership lists, one each for the front lobby table, the inside meeting room table and workshop organizers. Members should come to the meeting with their cards. The name of members who do not have their cards can be checked on the list.
- Ensure that the clip boards have sufficient sign-in sheets in numerical order.
- Ensure that you have enough membership forms, receipt books, door prize tickets and other office supplies.
- Create two sheets to advertise the speaker of the night. One will be displayed on the front lobby table and the other on the inside meeting room table. Information can be retrieved from the Program Chair or off the web or Face Book site.
- Ensure that you have small bills and change in the \$200 float.
- Check with the Program Director to ask whether the guest speaker will be providing a door prize. If not, purchase an item of approximate \$20-\$25 value. Although Membership had been providing \$20 gift certificates for Zoom meetings in 2020 and 2021, the Board decided in October 2021 to discontinue door prizes for Zoom meetings (Door prizes have continued for Zoom 2023 provided by the President).
- Let the President know if Membership requires special table arrangements.

### 4) Tasks During a General Meeting

- Arrive about 30 minutes early to complete the Membership table setup. Typically, there are two tables in the lobby and one table inside the meeting room.
- One of the tables in the lobby is for the sale of memberships and guest passes. The Membership Chair and one greeter usually work this table. Typically, all cash transactions occur in the lobby. At this table you will need to place the cash box, receipt books, membership forms, membership cards, pens, presentation ad sheet, double tear away raffle tickets (for door prize) with a basket to retain part of the ticket, relevant signage, and sign-in sheets for guests. New or renewing members pay for their memberships and receive their cards at this table. Guests pay their pass fee, pick up their door prize tickets and sign-in at this table. The second lobby table is used to lay out the membership cards for pick-up by members as they enter.
- The table inside the meeting room is worked by two greeters. They check the membership cards as members enter, request that they sign the sign-in sheet, and provide them with a door prize ticket, when

required. At this table you will need two sets of sign-in sheets, double tear away raffle tickets for the door prize, a basket for the retained part of the raffle ticket, pens, and a presentation ad sheet.

- One greeter and/or an ambassador should be at the door to direct people as they enter. This is most important at the January, February and the March meeting when it can get hectic at the front.
- Allow members to enter the meeting room at 6:30 p.m. Prior to that, tables are being set up by the various groups.
- Having two greeters at the door, two volunteers working the lobby table and two working the meeting room table enables one of each to take time to enjoy the pre-meeting time while the other continues with their tasks.
- The Membership Chair used to count the money taken in, memberships sold, etc. while the meeting started. They could then present the completed form to the Treasurer at the end of the meeting. However, this practice often meant that the Membership Chair was not able to enjoy the presentation and meeting. The past few years, when there were many forms to tally and money to count, the Membership Chair took home the cash and passed along a completed Remittance form to the Treasurer the following day.
- Count your float to ensure that the correct amount is retained for the next meeting.
- Collect the sign-in sheets so that you will know the total attendance for the meeting.
- The Membership Chair and the greeter may move into the meeting room once they have closed-up and put away the items on the lobby tables. It is a good idea to keep some forms out and to sit at the meeting room table during the meeting. Occasionally, members arrive late and need to make payments.

#### 5) Follow-up After a General Meeting

- File any membership forms once you are finished with them.
- Ask the Database Manager for an updated membership list once the new names have been entered, currently the Chair is the DbM for membership.
- Prepare notes for the CVHS Board monthly report, including the number of members and guests in attendance, number of new members, cumulative number of members.

#### 6) Square

- CVHS uses Square for the online purchase of memberships, guest passes and donations. Square may be used at events. The Membership Chair or another member of the membership team monitors the online system. The President and/or Membership will provide the login information to volunteers requiring access such as the Treasurer for budget purposes. The login is located at: <https://squareup.com/login>.
- Listing items for Sale
  - The individual membership and family membership should already be listed in Square. If you need to re input them follow these instructions. To list items for sale in Square (individual and family memberships) login to Square at: <https://squareup.com/login>. Choose 'Items' from the list on the left-hand side of the screen. Choose 'Create an Item' from the upper right of the screen. Complete the details including the 'Name' of the item, 'Description' and 'Price'. Create the 'Online Checkout' link: <https://checkout.square.site/merchant/MLXX0EHK5KSA0/checkout/VZHINXR7JPLNRCIUS4WXXKHC> P. The other categories may be left as the default. Finalize it by choosing 'Save' in the upper right-hand corner of the screen. At the time of writing, online individual yearly memberships were \$21.95 (\$20.00 plus \$1.95 for postage and the Square fee) and family memberships were \$32.25 (\$30.00 plus \$2.25 for postage and the Square fee).
  - The text for an individual yearly membership presently reads: "Memberships for individuals are \$20 per calendar year. \$1.95 is added for postage and administration. Memberships are processed by volunteers and it may take several days for the process to be completed. Monthly meetings and presentations are included in the cost of a membership. A registration email will be sent to members the Saturday prior to a meeting/presentation."
  - The text for a family membership presently reads: "Family memberships are \$30 per calendar year. A 'family' is defined as up to 2 adults and any children under 19 living in the same house. \$2.25 is added for postage and administration. Memberships are processed by volunteers and it may take several days for the process to be completed. Monthly meetings and presentations are included in the cost of a membership. A registration email will be sent to members the Saturday prior to a meeting/presentation."
- Guest Pass Event

- i) A new guest pass event is placed on Square for each month that CVHS has an online presentation. The guest pass item should be listed in Square the beginning of each month and should be made 'unavailable' at 5:00 p.m. the Friday prior to the presentation. After this time, guest will not be able to register, which allows several days to process guest passes. The Program Chair will provide the name of the speaker, the presentation title and an image. The information is also on the CVHS website.
  - ii) To create a new guest pass event, upon opening Square choose the 'Online' icon on the upper left-hand side of the screen. Choose 'Website', then 'Edit Site' from the column along the left-side. When new page opens, choose 'Events', then 'Create and Event'. Complete the form adding the name of the event, e.g., 'Guest Pass – Leslie Cox, 'Winter Gardens'; the price [\$5.50]; a brief description of what the speaker will present; enter 'Comox Valley Horticultural Society' for the 'Location name'; choose the 'Start time' and 'End time' [typically 7:00 p.m. and 9:00 p.m., respectively]; then add an image supplied by the Program Chair or an image related to the presentation. Finalize by choosing 'Save'. When the system returns to the Events page, choose 'Publish' in the upper right-hand corner of the screen to link it to the CVHS website. Check the CVHS website to ensure that it appears correctly.
  - iii) To make guests aware of the process, after a brief description of the presentation add text similar to the following "After purchase of a guest pass, a registration invite email will be sent on the Saturday prior to the event. Click on the link to register well in advance of the meeting. You will be sent a Zoom meeting link automatically. The meeting starts at 7:00 p.m. Please join the Zoom meeting 10 minutes in advance. (Price: Non-members - \$5.50; Members - included in membership fee)".
  - iv) To make an event unavailable, from the Square Home page choose 'Items' from the list on the left-hand side of the screen. Choose the item that you wish to change. Go to the bottom of the 'Edit Item' page to 'Square Online settings' and choose 'Go to Square Online'. On the Item Information page that opens, go to 'Visibility' and choose 'Unavailable'. You will be asked to complete the 'Location address' information. Then save. The guest pass will no longer be visible on the CVHS website.
  - d) Check Square at least on a weekly basis. Square will send to the Membership email address a copy of the email sent to customers received after making a purchase. To see the actual purchase and process it as 'completed' login at: <https://squareup.com/login>. Click the 'Orders' icon to bring up the list of recent customers. Click on a customer to open the information about their purchase. Choose 'Mark as...' to mark as complete. Then choose the next name on the customer list and similarly mark it as complete. You may then log out.
  - e) Provide the Treasurer with the login information. They will need to access the Square reports related to sales of memberships and guest passes. To access the reports, from the Square home page choose 'Reports' from the upper left-hand icons. Set the month for which the report is required located at the upper left and choose 'Sales Summary' for the type of report. The gross and net sales are displayed on the screen and may be printed out from this page. The Treasurer will also need the number of each membership and guest pass sold. This can be accomplished by choosing 'Item Sales' from the left-hand list. Once displayed it also may be printed out from the page.
- 7) By-law sections relevant to Membership
- a) Application for membership, Section 2.1 "Any person who pays the annual membership dues may be a member."
  - b) Amount of membership dues, Section 2.3 "The amount of the annual membership dues shall be recommended by the Board. Annual dues shall be approved by the membership at the Annual General Meeting. Annual membership dues are payable on January 1 of each year.
  - c) Member not in good standing, Section 2.5 A member is not in good standing if the member fails to: (a) pay the annual membership dues with in thirty (30) days..."
  - d) Date of Annual General Meeting, Section 4.1 "The Annual General Meeting shall occur during the month of October of each year."
  - e) Order of Business at the Annual General Meeting, Section 4.3 "The order of business at the Annual General Meeting is as follows:...(g) chose Committee Chairs;..."