

## **Operations Worksheet 10 – Database Manager**

(Reviewed/Revised – March 2013)

The Database Manager is a member of the Executive Committee (EC) and attends meetings of that committee, which normally take place on the first Monday of each month. The Database Manager is responsible for maintaining a consolidated database for the Chapter, using Microsoft Access.

Background: The Database Manager many years ago created and imported the Chapter roster into a Microsoft Access database, which provides a great deal of flexibility to sort on just about any piece of information that is collected, and to provide various rosters, etc., as desired. That trend is maintained today, but is not a “set-in-concrete” way of doing business. However, any database manager employed in the future must be flexible enough to meet the needs of the Chapter and to import the existing data from Access.

Duties of the Database Manager include, but are not limited to, the following:

1. Collect and receive data from new members via the chapter membership application and enter it into the appropriate database.
2. Keep a listing of deceased Chapter members and spouses in Access.
  - Notify MOAA of deceased Chapter members and obtain a MOAA membership number for the surviving spouse; provide that information to the Chapter President, Personal Affairs Chair, and the Chapter Secretary
3. Provide a listing of deceased Chapter members and spouses to the Florida Council of Chapters (FCOC) Secretary for the preceding calendar year. This listing should be in an Excel spreadsheet.
4. Provide monthly data to the *Officers Call* editor in a timely manner, to include the following:
  - a. Names, rank, branch of service, status (active or retired), addresses, and phone numbers of new members.
  - b. Names and dates of deceased members or spouses.
  - c. Number of Chapter members, total, and by regular or auxiliary, as well as a breakout by service.
  - d. Names of Gold, Silver, and Bronze members who contributed to the Chapter maintained funds (Scholarship, Officers Call Boosters, and HOT)
  - e. Names and birthdates (day only) of chapter members with birthdays in the upcoming month.
5. Provide a monthly mailing roster of name, rank, address, and label status to the printer and mailer of the *Officers Call* as well as to the editor. This must be in an Excel database (copied from an Access Query and pasted into Excel) compatible with the needs of the printer and mailer.
6. Provide names, addresses, and birthdays (day only) to the Chapter “Sunshine Sally” to use to send out monthly birthday cards.
7. Coordinate with the chairmen of the Membership, Memorial, Personal Affairs, and Personnel Committees to provide data as needed to meet their needs in a timely fashion.
8. Provide mailing labels and rosters as requested by the various board members and committee chairmen, subject to approval of such requests by the President and/or EC.
9. Notify MOAA and FCOC of the membership numbers in accordance with their timelines and requirements.

10. Provide MOAA a yearly listing of Chapter members at the completion of the Chapter membership renewal drive (in an Excel database).
11. Incorporate any listings of prospective members provided by MOAA into an Access database to allow for greater sorting flexibility.
12. Create and provide the yearly donations letters IAW IRS requirements to the printer and mailer. Mail Merge these letters with an Excel spreadsheet
13. Collect and log donations to the Chapter funds. Report these donations to the Chapter Treasurer and provide a listing of them, along with the deposit should it be made by the Database Manager.
14. Create the Chapter Roster book on a yearly basis in February after the Chapter membership renewal effort is concluded and membership is known; send that to the printer and mailer along with an Excel spreadsheet listing names and addresses for mailing.
15. Create the Chapter Memorial Service Book.