



# **POLICY**

## **SUBJECT AREA: MEMBERSHIP**

**Last Updated: July 30, 2018**

**Version 1.3**

**This document supersedes all previous policies and directives relating to the above subject area**

**B&O Railroad Historical Society**

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**CHANGE AND ACCEPTANCE LOG**

<b>DATE</b>	<b>AUTHOR</b>	<b>HIGHLIGHTS OF CHANGES</b>
9/12/2016	Bob Hubler	Version 1.0 – Initial draft.
9/30/2016	Bob Hubler	Version 1.1 – Revisions
2/20/2017	D. Allen Young	Version 1.2 – Reformatted to standard policy template
2/25/2017	D. Allen Young	Version 1.3 – Modified Change Log page to Change and Acceptance Log, dropped separate Acceptance (signoff) page from Appendix

## 1.0 OVERVIEW

The Membership Chairperson is responsible for maintaining the roster of members of the B&O Railroad Historical Society (“Society”). The Membership Chairperson shall prepare mailing lists for Society publications, manage membership renewals, report to the Society Officers and Directors regarding the state of the Society’s membership and resolve all problems or issues related to the membership of individual members.

## 2.0 CLASSES OF MEMBERSHIP

There are eight classes of membership in the Society. These membership classes are defined below for information only. The Society’s Board of Directors may, at their discretion, create additional categories of membership or cancel existing categories of membership at any time.

- **Regular Member:** Receives *The Sentinel* for the duration of his/her membership, is entitled to vote in the Society’s annual election of officers, receives a member discount on merchandise purchased from the Society’s Company Store and is entitled to attend the Society’s annual convention and mini-conventions.
- **Sustaining Member:** Sustaining members receive all the rights and privileges of Regular members and, in addition, received a complimentary copy of the Society’s calendar each year, conditionally provided that they are a Sustaining member in good standing as of October 1st of each year.
- **Foreign Regular Member:** A Regular member of the Society residing outside of the United States. Foreign Regular members are entitled to all the rights and privileges of a Regular member of the Society residing in the United States. This category of membership is established as a separate category only because Foreign Regular Members are charged higher dues to compensate for higher mailing costs to foreign countries.
- **Foreign Sustaining Member:** A Sustaining member of the Society residing outside of the United States. Foreign Sustaining members are entitled to all the rights and privileges of a Sustaining Member of the Society residing in the United States. This category of membership is established as a separate category only because Foreign Sustaining members are charged higher dues to compensate for higher mailing costs to foreign countries.
- **Life Member:** A Regular member of the Society whose membership does not expire. Life members are entitled to all the rights and privileges of a Regular member of the Society. This category of membership is currently closed to new members, although current Life members may continue to hold this category of membership. However, no new or current Members of the Society may purchase Life memberships in the Society. The only exception is that the Board of Directors may at its discretion grant Life Memberships as awards for individuals who make significant contributions to the Society.

- **Student Member:** This category of membership is available only to full time students up to and including the age of 17. Student members have all the rights and privileges of Regular members except that they are not permitted to vote in Society elections.
- **Institutional Member:** This category of membership is reserved for Non-Profit organizations (usually other railroad historical societies) or members of the press. Institutional members receive copies of *The Sentinel*. They are not entitled to attend Society conventions or vote in Society elections.
- **Exchange Member:** This category of membership is limited to other railroad historical societies that provide the Society with free copies of their publications. In exchange, these societies are provided with free copies of the Society's publication. Exchange members pay no dues and neither they nor their individual members may attend Society conventions, vote in Society elections or receive discounts at the Society's Company Store.

### 3.0 MEMBERSHIP MAINTENANCE

The following is a descriptive listing of the specific duties to be performed by the Membership Chairperson and the specific intervals at which they are performed.

- **Maintains Membership Database:** The single most important duty of the Membership Chairperson is to maintain an accurate roster of the Society's membership. This roster must contain accurate information on the active members of the Society and should retain as much information as possible on former members of the Society. This roster must contain the names, addresses, member numbers, expiration dates and membership categories of all active members of the Society. It may also contain phone numbers and email addresses of members if this information has been voluntarily provided by the members. This roster may also contain such additional information as the Membership Chairperson sees fit. The membership roster is continually updated as new information becomes available.
- **Membership Renewals:** The Membership Chairperson shall notify members of the pending expiration of their membership and shall facilitate renewal of their membership. All Society memberships expire on the first day of the month. The Membership Chairperson shall provide up to two notices of membership expiration. The first notice shall be mailed 6 to 8 weeks prior to expiration. For example, for a membership expiring on January 1, the initial renewal notice would be mailed no earlier than November 6 and no later than November 20 with the goal of mailing the notice as soon after November 6 as practical. If the member does not respond to this first notice, a second and final notice shall be mailed 6 to 8 weeks after expiration. For a membership which expired on January 1, this second notice would be mailed no earlier than February 12 and no later than February 26. All renewal notices are sent via First Class Mail. All renewal notices contain a coupon, prepopulated with

pertinent member information, which the member is expected to separate and return with proper payment.

- **Term of Renewal:** All new member applications and membership renewal notices list the categories of membership and the annual dues for each category of membership. The Board of Directors has formally adopted the policy that The Society will accept 2-year memberships upon payment of twice the annual dues but that The Society will not accept memberships for a term exceeding two years. Therefore, the Membership Chairperson must reject membership applications which exceed this formal 2-year limit.

Of concern here are members who attempt to renew their membership through the Company Store each time that they order merchandise through the Store. They often attempt this multiple times in a calendar year. The Membership Chairperson shall accept these Store renewals provided that they do not extend the member's membership expiration date beyond the 2-year limit. For those situations where accepting the Store renewal would extend the member's membership expiration date beyond the 2-year limit, the Membership Chairperson must reject the renewal and refund the dues submitted.

- **New Member Welcome Packets:** All new members receive a personalized welcome packet upon joining the Society. These packets consist of a copy of the most recent version of the Society's main publication, a personalized Welcome letter from the Membership Chairperson and a membership card in the Society. These new member packets are sent via First Class Mail and are sent as soon as practical after receipt of the new member's information.
- **Membership Cards:** All new members receive a membership card from the Society. Membership cards are laminated, wallet sized cards printed on cardstock and inscribed with the member's name, member number and date of joining the Society. Members receive one and only one membership card. Membership cards are never re-issued. Membership cards are never provided for membership renewals, not even if a membership lapses and is renewed after an absence of months or years.
- **Sustaining Member Calendars:** All sustaining members are entitled to a complimentary copy of the Society's Calendar as a part of their Sustaining membership. The policy for providing these Calendars is narrowly defined and involves rigid, inflexible deadlines. This policy is described in detail in this document to avoid confusion and complaints. Sustaining members of record as of October 1 of any given year receive a calendar for the following year. These calendars are shipped in a single bulk mailing made as soon as practical after October 1. There is one and only one bulk mailing of calendars. Any new sustaining member who joins the Society after October 1 or any current regular member who upgrades his membership after October 1 is placed on the calendar mailing list for the following year and must wait until that time to receive his calendar. There is no second bulk mailing of calendars under any circumstances. The only exception is in the case of a calendar included in the single bulk mailing and which is lost in the mail. In such cases, the member should notify the Company Store manager of the

lost calendar. The Company Store manager must confirm with the Membership Chairperson that the calendar was, in fact, included in the bulk mailing. Upon receiving this confirmation, the Company Store manager will take a calendar from his stock and ship the replacement calendar to the member.

- **Mailing lists:** The Membership Chairperson shall produce mailing lists from the membership database for specific Society purposes. These mailing lists fall into three categories. The first is to support mailing of *The Sentinel*. These mailing lists are produced four times per year coinciding with the publication of the Society's magazine. The second type of mailing list is to support the bulk mailing of Society Calendars to Sustaining members. This type of list is produced once per year on October 1<sup>st</sup> of that year. The third type of mailing list is specialized lists, requested by the Board of Directors to support some specific Society purpose. Such lists are produced at irregular intervals, upon request from the Board of Directors.
- **Membership Reporting:** The Membership Chairperson shall provide periodic reports of the status of the Society's membership. The specific format of these reports is left to the discretion of the Membership Chairperson. However, the reports should include information regarding the number of members of the Society, the number of members in each category of Society membership and recent gains and losses in terms of Society membership. Membership reports may include trending information if it is possible to identify such trends.

Membership Reports fall into three categories. The first category is reports to the Board of Directors. These reports are produced 3 or 4 times per year for presentation at formal Board of Directors meetings. The second category is reports to the general membership. These reports are produced once per year for presentation at the general membership meeting. These reports are more high level in nature and do not include the level of detail as those provided to the Board of Directors. The third category is specialized reports, requested by the Board of Directors, to support some specific Society purpose. Such reports are provided at irregular intervals, upon request from the Board of Directors. These reports are very specialized in nature and their content is dependent upon the specific Society purpose supported by the report.

- **Membership Database Backup:** The Membership Chairperson shall maintain an electronic backup of the latest membership database in a safe and secure location removed from the location of the active database itself. Additionally, the Membership Chairperson will provide an electronic backup to the Corporate Secretary at the end of each quarter, and upon request to the Company Store Manager or other members of the Board of Directors upon request.