



# *Association of Universal Healers and Spiritualists*

**Charity Number 1014604**



## **Membership Secretaries Procedure List ON-Line (A5) Colour Version**

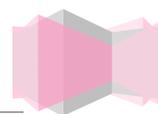


Created by Catherine Greenup 2013

**This version is for AUHS on-line only**

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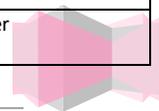


# Membership Secretary Procedure List



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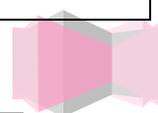


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**Volunteers Working Contract and Agreement**

**Association of Universal, Healers and Spiritualists**  
Charity No: 1014604  
99 Wealcroft, Leam Lane, Gateshead, NE10 8LN  
Telephone: 0191 442 2109  
*Affiliated to British Alliance of Healing Associations*

Declaration of acceptance and willingness to act as an unpaid trustee of the Universal Spiritualist Association.

I, the undersigned agree to join Executive Committee of the Association of Universal Healers & Spiritualists for the coming year. I understand that this entails being an unpaid Trustee of the Universal Spiritualist Association and I agree to abide by all the regulations and responsibilities of trusteeship as set out by the Charity Commission and the constitution of the Universal Spiritualist Association.

I understand that if I wish to resign as trustee I must do so in writing and that this can only be accepted if it is in line with the rules related to Trustees as laid out in the Constitution of the Universal Spiritualist Association .

Name .....

Position on Executive .....

Date of birth.....

Signed .....Dated .....



*The document opposite must be signed and dated indicating that you agree to stand on the Executive and carry out your responsibilities as set down within the rest of this book on behalf of AUHS and members.*

*This booklet has the training information and vital references tips and tools which you will refer to very often during your work. You should also be given a copy of the members welcome Book with our constitution rules and guidelines.*



### **Hours of work**

There are no set hours. You work in your own time and pace choosing how many hours a day or week you want or need to devote. Busiest times will be dictated by how many renewals you have. Some months have more than others. The key to comfort is good organisation. Once you become accustomed to the work and get into the swing of things you will find it isn't busy at all and there wasn't any reason to worry about taking it on. Of course you receive expenses for receipted work carried out which you have paid for yourself initially. If goods are invoiced with a delivery note it's possible to pay directly to the company from AUHS funds if first authorised.

### **Shortlist of duties (Some for your Calendar)**

1. About 1<sup>st</sup> of each month send out renewals due:-
  - a. Enter date reminder sent out into month due file on database against members record
2. Process returned renewals weekly or when received:-
  - a. Enter into database
  - b. Post out new membership cards (to Healer Leader if more than one renewal for that church)
  - c. Post cheques to Treasurer or pay into HSBC back yourself, keeping a record of cheque details on your files in case of problems.
3. When needed – Check for lapsed members:-
  - a. Cut and paste members details from Master File to lapsed file
  - b. Delete members details from month due file
  - c. Inform President to help you chase them up
  - d. Send second renewal letter to lapsed member
  - e. If no reply move members details to cancelled file
  - f. Also inform President, Secretary, Newsletter Editor, Minute-taker of change of details as they are no longer AUHS members

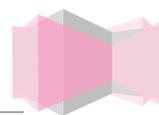




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- b. Record on database when renewals were sent out.
  - c. Record on database when renewal forms and payments were paid.
  - d. Send cheques to Treasurer or pay into HSBC yourself.
  - e. Keep a record of cheque details in your database for future reference in the event of a problem.
  - f. Chase up late payers.
  - g. Inform President to help you chase them up.
  - h. Post out new receipt documents on A4 glossy card or photo quality paper to those who have paid.
13. New Affiliates – Post out affiliation application form.
- a. Inform President of new applicant as he/she will have to visit applicants church/group and assist in their application if necessary.
  - b. If application is passed during an Executive Meeting enter their details into your database and post out their receipt on A4 glossy or photo quality paper. Their first year's affiliation is free.
14. Membership Badges
- These were originally done by Membership Secretary when first created, but currently are being done by National Secretary. This is strictly speaking a Membership Secretary duty however if you feel you don't have time to take this on simply leave as is with National Secretary. If you do wish to take it on, ask for it to be handed back during an Executive meeting so that everyone knows where they are and who to contact for them.





## Membership Secretaries Procedures

### Handing over the job

The first document you need to sign will be a copy of the “Volunteers working document” example at the beginning of this booklet which will also be your copy proving you have officially taken over the position.

All the information you need to carry out these duties is contained within a password protected memory stick which you will be given once you have officially taken over this position. You will also receive a box of the membership cards at the same time. These are the only documentation you need to get started.

### This booklet

Because not everyone is accustomed with office procedures and every office duty is by its nature different within even similar organisations, we have set out this booklet in step by step format. Some of you might find it rather slow, but if you already know some sections simply move quickly on to the next.

### Interim Period

Until our members become used to the fact that you are our new Membership Secretary they may send their letters or requests to the former Membership Secretary or to an Executive they know well and trust to help, in which case you might receive letters from all sorts of quarters for a short time until things settle down. Don't worry about it, that's quite normal during this time if things go astray it's no one's fault.





### Your first job

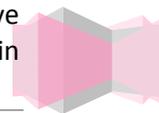
The first job you should do if it hasn't already been done is to change the contact details on all the documents you will be using to your own contact details. Add a telephone or mobile number to the forms making it very easy for members to get in touch. This is very important because members often worry if they don't hear from us in reasonable time.

### Next – create a separate contact e-mail

You will be using e-mail almost every day to carry out AUHS duties and you will quickly find it is a valuable time saving friend allowing you to communicate with both Executives and Members easily and very professionally. It's the modern almost instant way of getting information through and it costs nothing to send documents etc., by attachment. The only word of caution with e-mail of course is to be careful if you think the information falls under the "Data Protection Act" then perhaps it would be better to send it "must be signed for" and pay a little extra for the sake of security and piece of mind.

### Disposable addresses

Since AUHS are always trying to save money, it's helpful to use a disposable e-mail address which you can use specifically for AUHS business if you don't want to use your private home e-mail and/or if AUHS don't have business e-mails for their Executives at that time. Your own e-mail provider might allow "Disposable e-mails" extra to your main account such as Virgin or BT and the benefit of creating one of these of course is that you will receive them in your usual in-box rather than having to go to another e-mail account and login. You can still personalise such a disposable account to make it instantly recognisable from any private e-mails you receive and even create a separate file which they can be received in



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leaving your main in-box free and when you leave your Executive position you can simply delete the disposable one so you don't receive any more unwanted mail.

If your provider don't have disposable e-mails don't worry because there are lots of free e-mail providers on-line such as "G-mail" and "Yahoo" for example and these are extremely easy to setup.

### Bulk mail

In fact I wouldn't worry too much about the risk of getting dozens of AUHS e-mails you will find there aren't really that many enquiries or queries from members. However the disposable e-mails are also very useful for sending out bulk mail, such as if you happen to have quite a number or renewals to send out on the same month. Some Healer Leaders prefer to receive them by e-mail whilst others still need them via Royal Mail. But if a member does have a Healer Leader who uses a computer e-mailed forms save you a lot time and AUHS a huge amount in postage, I leave the choice to you. The main thing is, if you must send bulk mail to protect everyone's e-mail address please use "BCC" and put your disposable e-mail address as the sender address, by doing so, people can only see your e-mail address not the one's you have sent out. So you are protecting member's privacy and from receiving spam etc.

### Advertise yourself

OK, now you have your paperwork and contact information sorted out. Next you need to further advertise the fact that you have taken over the position by contacting the website administrator and sending him/her a passport sized photograph of yourself for inclusion within AUHS official

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website contacts page. Tell the website administrator what information you want alongside your photograph which might only be your disposable e-mail address. To preserve your privacy on-line we don't advise you include your home address or home telephone number that's fine for AUHS forms but on the worldwide web that's another matter - to preserve your security it might not be a good idea.

### Head Office Address

Applicants and members can use the head office address and telephone details if they chose and you will still eventually receive their messages from our President (because the Head Office address is always the President's address). Of course members will also be told about their new Membership Secretary and how to contact you within the Minutes. You can include a little about yourself and/or your church or group if you want on the website, but keep the word count down to about one hundred please.

### Preparation for your first letters

I promise you, you will never be inundated with applications or returned renewals etc., you will generally have a clear idea of what work-load to expect of course by how much you have sent out, if you sent it out naturally you can expect it back in due course. You are likely to receive a steady stream through your letterbox throughout the week once you get up and running properly which will generally take only about one month with the help of the former Membership Secretary. It's very likely that the previous Membership Secretary will have been good enough to get the database as up-to-date as possible before handing it over and this may mean you have ample time to settle into the position and become accustomed to the procedures at your leisure.



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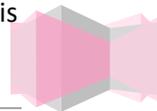


### The Handwritten Database

When AUHS was first born all records were handwritten because use of computers was the privilege of large companies and private ownership was almost unheard of. That is around about the time when the Sinclair and Commodore 64 computers shot into popularity for games and very basic data storage and electronic typewriters were just beginning to be used in the office. AUHS has never had its own Head Office Building and it is only recently that most AUHS members now own computers for home use. That being the case, this database is still very new and evolving. It is held on Microsoft Excel simply because most people know how to use Excel and AUHS can't afford to have created its own purpose built membership database. Whilst Excel is a bit unwieldy for a large complex and growing database like ours it does work very well and you can store and create as many records, files and reports as you want or need.

### A Database to dream of "Filemaker"

AUHS has access to a very powerful database software called "Filemaker Pro Advanced" but sadly no one really knows how to create the database using its step-by-step very modern programming which could give AUHS a database as versatile and user friendly as anything very large companies such as retailers and bankers could ever dream of. Although AUHS is small it doesn't need to feel like the pauper amongst the giants in Spiritualism fearing the future of Membership management when such an opportunity is only waiting to flourish. Filemaker has the power to handle every aspect of AUHS in the finest detail it is also compatible with Excel and word so when AUHS is ready to grow we have the means to keep up with the big organisations just not the knowledge at the present. It seems that for the time being this system is still part of our future hopes.



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### Current Database

Nevertheless we have taken the next step by lifting AUHS into the computer age with a Database using a slower but widely used package called Excel making it hugely more efficient than when written by hand. I will tell you about the Database in greater detail later on in this booklet so don't worry. For now it's enough to say there is a "Master File" and "Working Files", two files where you will store all necessary membership information and maintain a history for each individual member. Both files fall under the Data Protection Act and so anything within these files or printed from these files must always be kept secure and locked away.

1. Master File - The most important file in the database. This file is not split up because it holds all our members personal information in one place. It's very useful to allow you to print out a hardcopy so that you can quickly answer telephone queries if you haven't got your computer on for example. From this file you sort out ten year memberships and split out the different membership types with ease for reports etc.
2. Working files – These files are also extremely important it is created directly from the Master-file but is spit into months and the members within each month are those whose renewals will become due on that date. Here is where you record the date you sent out the renewal and the date you got it back. This is the only way you can keep track of who has paid, who has not and who is due in that month and who you should lapse. From these files you can sort out the lapsed and cancelled and deceased member's details and provide AUHS with an accurate history of



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member's movements within AUHS over the years. You can double check some details by searching between the two files which is extremely useful sometimes if a former member wants to rejoin or a record seems to have been lost.

### Archiving Database each year

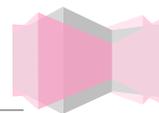
If the working file seems to get too large you can "Archive" a copy by saving a copy under a different name (I'd name it after the current year for example) and creating an archive file to hold it logically where it can be found if need be. This is most logically done the same time as the financial year end in March. This is useful to recapture missing or lost information and to look back where there may be a question of how long a member has been with AUHS and perhaps when they changed membership type or marital name for example. Also of course so you can tidy up your current working file for the current year.

### Deleting information

My best advice to you would be never delete anything from the database. Simply move it into a relevant holding file from where it can be retrieved if need be. Legally you can keep personal information for up to seven years and you never know, if there were any case raised against any member this database might be their, or our, saving grace if kept accurately.

### Familiarise yourself with the database

For the time being the best way is to familiarise yourself with the style and format of the database and read the notes thereon. Also on the memory stick you will quickly find that you can read notes and at the same time look at the database to help make sense of the whole thing.





### Opening and working on multiple documents at the same time

You can keep at least two pages open at the same time side-by-side on your computer screen. You might already know this very useful tip but if you don't all you need to do is this.

#### **Great time saving tip**

1. Open your first document.
2. On your keypad on the left hand side at the bottom you will see the windows sign on one of the keys. Press this down and at the same time depress the right arrow button which you will find at the bottom of the keypad on the right hand side.
3. You will find that your open page jumps to the right hand side of your screen leaving half of your screen empty.
4. OK, now find and open your second document and follow steps one to three above.
5. All you need to do now is put your cursor on the bar at the very top of the open second page and you will see that it changes to a white arrow - click and hold down on this bar now drag your second document to the left.
6. Success, you now have two pages open at the same time and can work on both of them at the same time.
7. You can also change the size of the open pages by simply resizing them. Similar steps as above, but this time just click on the edges of the document, hold down and drag either in or out and you will notice the page changes size.
8. Another useful tip is you can actually have many pages open in this manner. If you want see a hidden page, simple click anywhere on the hidden page and it will jump to the front.





These two tips alone can save you loads of time.

### How do I find how to do things?

As I mentioned before, all the work is held on a “memory stick” and each individual procedure has been carefully written and split up into files under their respective subjects so you can immediately see both the file you are working on and the tips upon how to do that particular job without having to wade through lots of confusing unwanted information. Main file headings might be for example:-

-  a. Membership Renewals
  -  Renewal Forms
  
-  b. Application Enquiries
  -  Application Forms
  -  Enquiries Booklet
  
-  c. Probationer Upgrading
  -  Upgrading Forms
  -  Referee Forms

And so on and so forth. As you use these, you will find yourself creating your own folders and sub-folders to store the information used. Memory sticks hold a huge amount of information, so up to now AUHS has everything on one stick only. In time of course you can archive older information by moving it to a new memory stick, thus keeping your working files free of clutter.

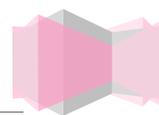




### **Making it easier to take in**

Because AUHS doesn't recruit Executives like companies do by relying entirely upon experience and qualifications gained. We can't take it for granted that members who take on our duties all know how to use a computer with confidence or have any office experience at all. Whilst e-mail and internet are really important skills, we can get by using telephone and snail mail if necessary. However, nominees with full computer and office skills are always urgently needed and vital for the smooth running of AUHS. That said, many of our volunteers are retired and their work is equally vital to us but they may not be so confident with computers so it's helpful to add information to this booklet which will cut down administration and learning time.

This booklet is the whole job in one place and an on-line version which can also be referred to if need be but it was also designed to show members what is entailed with this job if they were thinking about nominating themselves or others. By splitting up the duties in thus manner you will see the work is not so frightening or so much as you might first have thought. Mostly these tips have been put simply into files called "How do I do..." and the dots here explain the subject of what that file will help you with. For example "How do I do renewals", or "How do I do new applications". You will immediately know what I mean when you look into the files. Each one is like a little tutor sitting right beside you ready to help as soon as you need them.





### **What are we looking for in our Volunteers**

Well, if we were advertising for any nominee no matter the position our company advert might read something like this:-

The Association of Universal Healers and Spiritualists, a UK Registered none profit Charity Organisation for Spiritualists with a strong underlying unconditional Spiritual doctrine taken from the Christian faith yet open to any religious understanding preaching love and caring. Now looking for Nominees from 18 years old without any criminal record with the following skills:-

1. You must be willing travel widely across the whole of the UK and Isle of Man and have the means financial or material to achieve this aim
2. You must be willing to support any duty within AUHS if asked or should you see a need
3. You must agree to work without pay
4. You must have good computer skills and have computer equipment equivalent to and compatible with Microsoft Word Windows
5. You must be enabled to supply yourself with Word Windows and Excel packages.
6. You must be willing to learn new skills and openly share existing skills
7. Nominees displaying good people management organisational and mentoring skills will be welcomed

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So you will begin to realise that all our Volunteers are actually multi-skilled people some of whom may not have academic qualifications for the work they do and nevertheless they display the self same high qualities of workmanship and



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professionalism without seeking personal gain, high praise indeed.

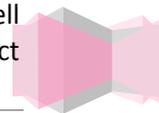
### **Other Literature to learn**

For any applicant or existing volunteer accepting and or fulfilling those terms whilst wishing to make their mark within our still growing young organisation. You have to take on quite a lot of personal responsibility for the continued good health of our organisation and as you know it's not always hearts and roses, sometimes difficult decisions have to be made and we have to often refer to our constitution and rules and guidelines of other supportive organisations linked to AUHS. So we can't always have our heads in the clouds and we must oftentimes think on more material things to keep us on the straight and narrow within UK law and the Charity Commissions doctrine. Together with BAHAs rules it all makes for an interesting management to take on with so many different facets to think of and learn along the way.

### **Suggested Titles**

1. *Members Welcome Book*
2. *AUHS Constitution*
3. *BAHA Standards of Healing*
4. *BAHA Code of Conduct*

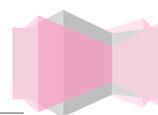
These are not the only booklets that you will have to refer to along the journey of your Executive life within AUHS. Personal, Spiritual and collective needs are sometimes difficult to cater for you will be tested and yet every member and volunteer achieves that little miracle of team work every day or AUHS wouldn't exist at all. Membership Secretary is indeed at the centre of our collective wheel because you will be in contact with every individual within our Organisation and with many outside of it wishing to join or wanting to sell you information and advice. You are the first vital contact



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and they will expect you to have all the answers and will look up to you for support. Since you can't make any major decisions on your own and you must involve the Executive you will need to be enabled to discuss the matters in hand with clarity and prior research and also be enabled to pass round leaflets which they can take away and read at their leisure. The suggested booklets are vital to know and understand because they are the core structure of AUHS administration and identity. All Executives and members are encouraged to read them.





# Procedure Lists

## What are Procedure Lists

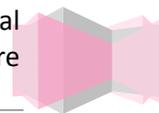
At their basic level in the work place it is modern practise these days to carefully write up “Procedure Lists” or step-by-step instructions for each duty needing to be carried out within the clerical side of administration, to tell anyone new to the job how to do that part of the job. But that procedure list won’t tell you how to do the whole job because some of it might be carried out by a volunteer or other person having the higher authority. Each procedure list by its nature will be specific to that part of the whole process.

## Who keeps them up-to-date

Indeed because you carry out these duties and know them best it might be your job to keep the procedure list up-to-date and suggest improvements or advice upon changes needed. Of course the job doesn’t belong to you personally it belongs to the company, in a training session I attended some time ago we were told that employees are viewed as being a valuable movable commodity and invested commitment in expenditure. So they are investing their time and money in your skills and must use them efficiently to get the most out their invested training in you to the benefit of their company, so, up to a point your career development is also important to them although they are generally careful not to train you beyond their needs or you might move on and take your skills with you and the company would have lost that time, money and invested trust to a rival.

## What other use are they

They could be linked to your individual “job description” and “employment contract” and can be added to your personal CV to help your company and others know what you’re



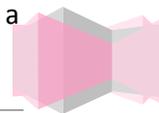
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working experience really is and what you are capable of if you want to move up the employment ladder so-to-speak. “Procedure Lists” have many uses some of which were described here. They aren’t just used to tell people how to do jobs. They are also a useful tool for Management who don’t very often know how their staff carry out the job they want doing but they might realise it’s time to streamline their clerical staff to assess if jobs can be speeded up or made cheaper to achieve, it might be they need to accommodate something new like a new computer system a move to a new office or expanded business for example. A redesign of procedures doesn’t always mean redundancies although of course sometimes it can be realised the job can be done by one person rather than two. Procedures can be about saving money and resources for the company especially during hard times. But they shouldn’t be feared because a company that isn’t organised, efficient, frugal and forward looking won’t last for long these days.

### What does AUHS use them for

This is done to speed up training of new volunteers and gives volunteers something concrete and confident to refer to whilst they become accustomed to their new position. It has to be remembered that the former Executive is not near to hand to ask and so training can be made more difficult by distance. Just like mainstream companies once you leave your position you don’t carry out any of the duties and must not keep any of the files so you won’t be kept up to date with any changes and with the best will in the world might advice the wrong thing over time. Initially however former Executives often advice new Executives how to get started, but the guidance of a “Procedure List” is a great support that is always with you. By Law Volunteers must be given a





written contract and training for their duties so the procedure lists actually fulfil that requirement for AUHS.

## "O" rdinary Membership

The first membership type explained below is the cheapest most basic membership type and a good way to be introduced to AUHS. Anyone can apply for Ordinary Membership from the age of 18 which gives the member the right to vote at the AGM together with the right to enrol upon AUHS courses and reduced fees for AUHS events.

### Ordinary Membership application (Type "O")

#### Where do Enquiries come from

The same is the case for all our membership types. You will most likely get enquiries directly from AUHS affiliated churches or groups and they will also have their own members. Membership of affiliated churches/groups doesn't mean you are also a member of AUHS.

#### How will they get application forms

To join AUHS people must make a separate application and send it to you. They can get application forms from a variety of places such as our website, the Church/Group Committee or from you the Membership Secretary.



## Membership Secretary Procedure List



### What do I do first

#### Register new member's details into database

- a. Within the "Master-File" in the "Members Database" you must allocate a new membership number for the new applicant (e.g. O246) "O" being membership type for Ordinary Member. Just use the next vacant number in the database (we don't reuse membership numbers).
- b. On the same line in the same file enter the new Ordinary member's personal details from the application form (home address, telephone no., E-mail address, joining date, Healer Leader etc.)
- c. Now you must copy and paste the same details into the "working file" under the month they have joined because this will be their renewal date (the working file is where you keep extra notes against each individual member, the master file is where you will filter details for reports)
- d. Don't throw the application form away because you need to scan it into the "Scanned documents" on the memory stick in a sub-file you will make yourself specifically for the new member. Naming the file using "surname" first with "forename" and date joined ("Greenup-Philip-May13" for example). This is where you will scan all that members documents in the future to track their movements within AUHS over the years.
- e. Next Create a membership card – sign the card in the appropriate place, put the new member's membership number with type on the card in the relevant place.
- f. Post the membership card to National Secretary along with the application form (National Secretary



## Membership Secretary Procedure List



needs to know new members personal details as he/she needs to send new member a copy of the Welcome Book with all the rules and constitution together with the new membership card).

- g. When it comes to renewing the new member's membership in a year's time, you simply create the new membership card and post it directly to them. Only if there are any changes to the membership would you inform the other Executives so that their membership database will always perfectly mirror your own.
- h. Send the cheque payment to Treasurer or you can pay them into the bank yourself. But you should create a record of the Check No., Name of person, date received and date you paid into bank of course, together with any other info. You feel might be useful should the cheque bounce or go missing in transit your record might vital in tracing it. Naturally; when posting cheques you should use must be signed for as further security.
- i. Inform National Secretary, Minute Taker, Vice President South, Vice President North, President, Newsletter Editor of the personal details of new member for their administrative records so they can post out documents to new member(s).

### Payment Choices

#### Standing Order

- j. Some members choose to pay via Standing Order, put the letters "SO" against their personal records in the master file and cut and paste their records from the working file into the "SO" working file so you remember they don't need a yearly renewal notice they only need a new membership card each year.





### Check Standing Orders Periodically

The Treasurer needs to know who is paying by Standing Order to ensure they haven't cancelled their standing order. Naturally in that case they'd need a renewal form as they'd have to pay cheque.

### Notification of Cancellation of SO by letter

Of course members' are required to inform AUHS if they do cancel their standing order, but in practise that seldom happens for one reason or another.

### Main problem without notification

If standing orders aren't checked out periodically there is a slim chance that they could inadvertently get their membership free as naturally you wouldn't know.

### Yearly Renewals

- k. As already described above the membership records are filed under the month they are due in the working file making it easier never to miss any individual renewal notice. And to know if they are paying by standing order or are "free" members. In both cases they only need a current membership card. You only need to remember to look within these two files each month to check if there are any due for that month.

- l. Organising your day

Although the jobs aren't full-time and won't generally take up full days or even every day, you still have to take time to organise your working routine in the first instance and AUHS leaves this entirely in your hands. Naturally I have found it helpful to discipline my working habits in-line with my personal life setting aside free time when I can concentrate quietly and make the duties easier by choosing one day a week a

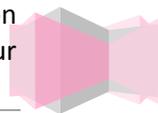




morning or an afternoon is mainly enough depending upon how much work you think you have to sit down and sort out the files and letters received through that week. You will receive all sorts so different enquiries because members don't understand how AUHS is organised or generally speaking who does what. That's why e-mail is so useful and means members get quick response which really makes them feel confident in us we are doing our jobs of course.

1. Letters
2. Renewals
3. New members
4. Cancelled members
5. Lapsed
6. Complaints

And a very few irregular telephone calls a month with possibly the same questions with questions asking about criteria eligibility for upgrading etc., The membership manuals actually will tell you how many years people have had to be members for the upgrades etc. and this is the type of information you will be expected to know. Here is a list of the main ones although you might have to read the manual for more in depth information and of course should the criteria change this booklet needs to be updated accordingly. The booklet which is always most up-to-date in fact is the "Members Welcome Book". Members could read the information for themselves but it comforts them to ask for it from one of the Executives instead. If their copy of the welcome book is out of date, the current one is almost always on our website in any case. It is advisable to renew your



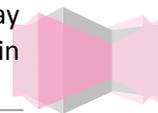


copy of the welcome book about every two or three years because there are usually many changes during each year. Of course there is a charge for a new copy. But in the real world, members don't ever ask for them and it would be too expensive for AUHS to provide an up to date copy for every individual member in any case.

### Criteria years

1. Eligibility to apply for or nominate for Executive  
At least one year fully paid up membership in any of the membership types with the fulfilment of other criteria set down in the manual.
2. Eligibility to apply for upgrading to Full Healer  
With the successful completion of two years study of the BAHA training manual undertaken with a Healer Leader.
3. Eligibility for upgrade to Healer Leader  
At least one year fully paid up membership together with the successful completion of BAHA training course, minimum is three years (two years training and one year with Full Healer Membership) together with passing an assessment paper.

Generally speaking it's my experience that you don't get heaps of letters they actually come to you in ones or twos per day. Naturally some letters need to be actioned on the day they are received so I do tend to open every one received and file them carefully beside my computer according to what they need. I found the method of daily sorting out messy and intrusive and I couldn't get to post office every day anyway because I work full time. For me one main





day a week works best and actually only ends up to be three hours or less spent at my computer with a trip to the post office before they close. Members are very patient, so you don't need to worry about short delays so long as their letters aren't urgent of course, but in that case you can send out a polite reply to let the member know you received their letter safely and their problem or issue will be answered as soon as possible.

m. Renewal letters

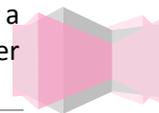
Are sent out as standard, within your memory stick you will find the form letters which you simply photocopy or print out from your computer. It's already done for you. Renewals are sent out on the month previous to the joining date, giving the member one month to send in their membership fees. **Tip** Don't send them out too early as some members reported having lost their renewal forms, blaming that for having lapsed.

n. Lapsed Members "L"

Should a member fail to return their fees around two weeks after you sent out the renewal form, you could send one further set of renewal and declaration forms (only healers get the declaration form) with a written warning that they will be lapsed if they haven't returned their renewals within a further two weeks.

Consequences of "Lapsing"

Lapsed Members are not members of AUHS and so are not entitled to any AUHS services. They lose any titles or privileges or certificates. If the member happens to be a healer they lose their insurance, if a Minister





they must not hold services or use AUHS as their backing organisation as this is illegal.

### The Hit List

Is given to the President to chase up the offenders and you must also inform National Secretary, Vice President South, Vice President North, Newsletter Editor of the personal details and new status. So that Lapsed members don't heal or receive any documentation from AUHS. Of course you must inform everyone again if they do rejoin.

### Why do I inform those Executives

For administrative purposes Newsletter Editor must cancel their copy, National Secretary or Minute Taker must not send Minutes. President must case them up. Vice Presidents and all other must remove them from their own membership records. Your membership Records and theirs must match.

### Executive Meeting report

You will also record their potential loss in a report to be taken to the next nearest Executive meeting confirming their status.

### Letters to cancelled members

A final letter should be written to these members informing them they are no longer members of AUHS as they haven't paid their renewal fees.

### Rejoining AUHS

The final letter should also advise lapsed members that they can re-join without loss of their previous status within two weeks of the date of your final letter. Further inform them





if they change their mind after that date, they must re-apply as if a new applicant and start right from the beginning. Former healers can regain their healing status but they must undertake a six month probationary period with a Healer Leader and if they don't have the current BAHA manuals, they must also purchase a new copy along with their re-joining fees.

### Lapsed Members who opt to rejoin

A lapsed member is for all intense purposes no longer a member of AUHS as we already mentioned above. This means that if they want to re-join they are rejoining as if a new applicant. You must register their details as for a new applicant giving them a new membership number and new joining date etc. However you must not delete their previous details which by then you should have moved into the cancelled members file on the database. Simply put a note against their cancelled details to effect of their rejoining, the date they rejoined and their new membership number. This is in case of confusion or other reasons at a later date.





## "P" Probationer Healers

### New Probationer Healer Memberships

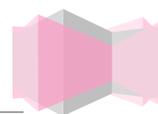
Membership Secretary will process applications for new memberships and manage existing members as follows, basically much of the procedure is the same as for Ordinary members with a few extras:-

#### Probationer Healers Membership application (membership type "P")

When you receive an application form for Probationer Healer along with that form the applicant should also have sent two passport sized photos and their cheque payment. Before you do anything with it, scan the forms and photos into a new file for that member into the Membership Database under "Scanned documents". Name the file thus for example "Greenup Philip – 29.5.13" the date of course is their joining date. Always put the surname first because the computer will sort your files in logical alphabetical format.

#### What to do with cheque

- a) Send cheque payment to Treasurer with a note telling him what the cheque is for or you can put the cheque into HSBC bank yourself
- b) Keep a record for yourself of cheque number/payment amount; date received; date sent to Treasurer and new members name address contact etc., in case of queries





### Registering new member on database

- c) First allocate a membership number for new applicant (e.g. P246) “P” being membership type for Probationer Member. “246” would be the next vacant number in the database. Don’t reuse numbers as this could conflict with other records in your database if you need to filter them out.
- d) Next input their personal details into the Master File within the Database from the application form (Address, Telephone number, birth date, joining date, Healer Leader, etc.,)
- e) Now copy and paste these same details into the renewal working file within the database (this will ensure you send out the new member’s renewal request for fees next year).
- f) Creating the new membership card is easy, first get one plastic card from the membership card box and sign it in the appropriate place. Then put the new member’s membership number with type on the card in the relevant place along with their renewal month date.
- g) Once done, you need to post the membership card and the enclosed two photos to Healer Representative whose job it is to create the Probationer Healer’s ID Card and compile the BAHA training Manual along with AUHS Welcome Book all these will be sent out together to new Probationer’s Healer Leader in one parcel.
- h) Now you must inform National Secretary, Minute Taker, Vice President South, Vice President North, President, Newsletter Editor of the personal details of new member for their administrative records.





- i) As discussed with Ordinary Members you must inform Treasurer if they chose to pay by Standing Order and record this within your own records.
- j) Yearly Renewals for Probationer Healer

The Procedure is almost the same as for “Ordinary Members”. You will already have recorded their personal details within the Master File and within the Working File and have scanned in the relevant forms. But Probationer Healers and Full Healers have an extra important form which must be sent to them along with the standard renewal form.

The “Declaration Form”

Must be signed by all our healers every year as proof they can still retain their Healing Insurance. They are not insured without having correctly filled in and signed this form. When you receive their returned renewal forms you should scan the declaration form into the database into the appropriate sub-file. When you have scanned them in you can just securely destroy them as the paper form is not needed any more.



## Membership Secretary Procedure List

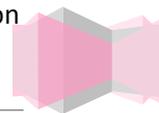


### Lapsed Healers

- k. Both full healers and probationer healers are prone to lapsing memberships. The same procedure is in place as for Ordinary Members. There are a few important differences however. Should a healer lapse membership they lose their insurance and should not heal within AUHS churches/groups. The path for them to rejoin is the same as with all other lapsed members except that they must agree to a six month probationary period to regain their full healing status and that option is only open if they rejoin within one year.

### Cancelled Memberships

Members who write to you asking to cancel their membership should have all their records cut and pasted into the cancelled file on the membership database. Remember we don't delete any records for at least seven years. Then if they do re-join at some point in the future which does happen, we know about their membership movements with AUHS in the past. There cancellation is effective from the moment you read their letter and all rights and privileges associated with their former membership are invalid and can't be taken to any other organisation. If there personal details have been record elsewhere such as the Home office checking service, they should be notified of their change of status with AUHS as soon as possible. Executives should be notified of their cancellation during an Executive meeting or as soon as possible for their own records. It might be helpful to also inform their church/group of the cancellation together with the Healer Leader to ensure they don't continue to heal within that affiliated church/group. Remember cancellation





of AUHS members in no way affects the membership of their own church/group as they are two separate memberships.

## Church or Group Affiliation

### Enquiries

Are few and far between – however those churches or groups who have joined have been with us for many, many years some of them from the very beginning of AUHS. If a Church or Group contacts you enquiring about AUHS, how to join and what AUHS can offer their own members. There is a separate booklet on-line which explains everything very clearly. You can also direct them to the President because it's his/her job to visit churches/groups to introduce AUHS to them and to get to know each other. Basically we offer these benefits:-

1. Very low cost Affiliation fee paid once yearly due on 1<sup>st</sup> January of each new year.
2. Various courses which if their members also join AUHS as individual members they can benefit greatly from.
3. Very low cost insurance and yearly fees for healers.
4. Free help and advice from AUHS and also from our umbrella organisations.
5. The right to have their own Ordained Minister so that they can hold wedding, funerals and naming ceremonies within the own church/group.



## Membership Secretary Procedure List



### Applications

As Membership Secretary you would send out the application forms for Affiliation with AUHS but the National Secretary also has the same forms together with an Affiliation booklet to give them more advice. To join they must give us various details such as a copy of their own constitution, and contact details for their committee members. Once filled in the application forms should be returned to yourself and the President should be informed so that he/she can contact the new Affiliate to visit the church/group and introduce ourselves in person. It's not your job to do that unless you want to go along.

### Renewals

Renewal notices should be sent out to the contact details for each individual church/group in early November of each year. This gives church/groups committee's ample time to pay their Affiliation fees. If they don't pay their fees in time you can send them a warning letter requesting payment as soon as possible. You can of course telephone their Secretaries and ask them why they haven't paid up.

### Telephone conversations

The telephone is a useful tool to encourage members to rejoin as it's almost face to face and very personal, however you must remember to always remain as respectful and understanding and helpful as possible, never get into an argument. Speak to them in person asking politely why they haven't paid and if they want to cancel membership or rejoin. If you get the opportunity explain how they can rejoin and give confidence that they would still be welcome within AUHS. Sometimes the reason they didn't pay their fees on time is because perhaps their renewal falls over the Christmas holiday period. If that is what you suspect, you can



## Membership Secretary Procedure List



give them a little extra leeway as we all know how tight finances can be at this happy time.

### Affiliation Receipt

Once the Affiliated Church Group has paid their fees you must send them a “Receipt Certificate” by post. These are printed out on stiff A4 Size card so they can be displayed within their church/group if they wish as proof of valid Affiliation with AUHS. You can scan in the Affiliation forms to the memory stick if they are returned to you, in this way you can keep track of any changes which they tell you.

### Criteria Validation

#### For certain posts is very important

Some posts within AUHS carry quite stringent criteria which must be fulfilled before they can take on these posts. Often the applicant hasn't bothered to check this themselves in the hopes we perhaps overlook this matter. The criteria's are all within the Membership Manual.

It is your responsibility as Membership Secretary to confirm or deny that person has fulfilled the required criteria by using their membership records on the database. That's why we don't delete anything and scan in and record as many notes as we are made aware of. All applications should be checked in this way and then discussed at the Executive meetings. You have protection in disputes if you keep to the rules using the criteria to back you up and any further notes which you might have in your possession. Posting needing to be checked are:-

Lay Officer to Minister Training

Full Healer to Healer Leader

Nominations for Executive posts



## Membership Secretary Procedure List



### Ten Year Certificates

Before every AGM you filter from the master file database all our members who have been members for ten years. Naturally you calculate this using their joined Date and follow it to the current year. They are entitled to a ten year certificate as a thank you for their loyalty which is normally presented at the AGM. You should also check that they haven't lapsed their membership in the current year as this would mean because they haven't paid their yearly membership fee, they aren't members of AUHS until they renew again. There is also a ten year badge and we used to give these out free along with the certificate, but members must pay for these now because sadly AUHS would lose a great deal of profit on the badges if they were given away.

### Who do I notify?

You send your list to the President. The President then notifies our certificate printer who prepares the certificates and posts them back to the President in readiness for the AGM. It does seem like a lot of back and forth sending of documents, but the President needs them back because he/she must sign them before they are presented. It's also best to take a copy of the ten year members list to the AGM in case the certificates couldn't be printed in time and so that the President can read out the names as part of his/her address, at least the members names can then go into the AGM minutes in recognition of their hard work over the years.





## Insurance To "BAHA"

### Yearly payment to BAHA for our Healers Insurance

This job is one of the most important that you can carry out in each year and it generates the largest bill for AUHS in each year prior to March which is AUHS financial year end. It's extremely important that your database is as up to date as possible before you calculate (or filter out) the numbers of Healers including Probationers needing insurance from BAHA. This is because miscalculation leads to AUHS paying for healers that we needn't pay for and of course lost funds is the result because BAHA do not refund anything paid to them.

### Chasing up none payers

Our not so favourite job and there lies the rub – so to speak, some members are extremely lazy in paying their renewal fees on time and some lapsed memberships irritatingly might go back as far as December in the previous year because of financial problems we all experience over the Christmas period.

### Persistent Reminders

Some members no matter how often they are reminded just don't understand the possible repercussions of late payment for themselves and for AUHS. Healer Leaders are encouraged to help AUHS by ensuring their Healers are paying on time or of course they run the risk of none insured members healing within their church or group and I don't need explain the ruckus that would ensue if there were a case raised against a none insured member.

### Great Care Taken

Since every member is precious to AUHS because we are still very small, we can't just lapse or cancel memberships without



## Membership Secretary Procedure List



careful thought but by the same token we can't allow members to hold us to ransom in a manner of speaking. Therefore you must make every reasonable effort to get them to pay-up before the deadline for this vital insurance payment which is middle April.

### Course of Action

Failing this the only course left open to you is to leave them off the list which goes to the Treasurer and tell none-payers you haven't recorded their insurance with BAHA because they haven't renewed in time. Naturally by this time you would have "lapsed" them, in which case they are no-longer members of AUHS in any case. At least you would have prevented AUHS paying out unnecessary funds for people who don't respect their place in AUHS and have simply disappeared off the map without a word. No organisation would pay for such poor support. Strictly speaking it's not your job to chase them up in any case. It's the members' responsibility to pay on time. AUHS are only showing our members great patience and respect by giving them every opportunity to remain with us.

### Paying up eventually

If eventually your kind persistence does bear fruit and they do subsequently renew, it's easy to add them to BAHA's list by telling the Treasurer so that isn't a worry at all.

### How do I filter Healers out

It's very easy from Excel within your "Master File" in membership database. Excel allows quite a lot of flexibility to create various membership reports opening them out within a new page. It's quite a powerful package and you filter out all the healers by using the membership "type", "H" and "P" as your search criteria. But be careful because we also have a few healers who are Ministers. It takes a little bit of



## Membership Secretary Procedure List



experience to sort them out quickly but takes seconds to achieve.

### Expenses

Naturally you receive expenses for all receipted stationary, postage, telephone calls etc. etc.

### Yearly Membership card Purchases

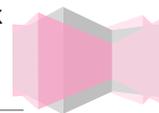
Once a year you need to buy a new batch of membership cards from the company below. They already have AUHS template and are very used to us calling them before the September AGM. The company unfortunately don't take cheques so you will have to pay using a credit or debit card but you will be reimbursed by the Treasurer as soon as you phone him the costs. You should send the Treasurer the delivery note and receipt as soon as you receive the cards from the company.

### Colour of cards

Each year you must choose a different colour for the membership cards, this choice is yours. There is a wide range of colour and the company can help you if you need advice. The only colour you must not use for the membership cards is white. Because white is also the colour of the healer ID cards.

### Finer Details

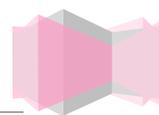
- 1) You purchase 250 cards (about £75.00)
- 2) Normally purchased before the AGM so you can recoup fee through Expenses quickly
- 3) Use up all previous years cards ideally for new members if you can
- 4) Never choose a white card because this would conflict with the healers cards
- 5) Better to avoid pink as our gentleman don't like pink of course





### Healers ID Cards

These are purchased from the same company and are different from the usual membership cards because they are specifically created for Healers who have successfully passed their two year healing course and are being upgraded to Full Healers. You would order these along with the membership cards but only if they are needed and current stocks are low. These are not really used as often as the yearly renewal cards and are held by the Vice President South who processes these (if we don't have a Vice President South the Healer Representative will deal with these upgrades). They will let you know when stocks of these are low enough to order new ones. All Healer ID cards should be updated approximately every ten years or so because naturally we all change in appearance as we get older. This hasn't been done before because naturally we are only just over 20 years old now and it wasn't thought necessary but was suggested during 2012. This would affect only the Healing members who have been with us from ten years or longer and it would be your job to advise only those members that they need to supply two current passport photographs in order to get their new ID cards. Of course Vice President South or Healer Representative would create the new cards for you so any reply letters would need to be sent to them, not to yourself. The reason you would need to chase up our ten year or older members naturally is because your membership list is the Master File and you have control of all relevant membership records and any others may be a little out of date.



## Membership Secretary Procedure List



### Card company contact details

The company details are as follows:-

PMC

<http://www.pmcsystems.co.uk/contactus.php>

<http://www.pmcsystems.co.uk/>

- Tel: +44(0)1793 848817
- Fax: +44(0)1793 848846
- Email: [info@pmcsystems.co.uk](mailto:info@pmcsystems.co.uk)
- Post: PMC Systems, Whitehill Lane, Wootton Bassett, Swindon, Wiltshire SN4 7DB

### Over payment of Healers Insurance to BAHA

You can only be as accurate as you humanly can be with these, don't worry too much. Any missed members or new members can be added at a later date throughout the year, so it's not a disaster. If you have paid for people who are lapsed and/or no longer members of AUHS it's not your fault if these people have not notified you that they want to cancel or have not paid their membership fees on time. The problem there is of course, because of those people being lax with their memberships AUHS has overpaid and will not get those funds back. This is why AUHS is quite strict with lapsed none payments.

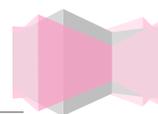




### **Breaking down membership numbers**

This job is very important because it gives the Treasurer, other Executives and members a very clear idea of how AUHS is really fairing and whether or not we are gaining or losing in that year. This gives us time to form a plan of action to bring AUHS again into financial security before anything serious occurs. That might be by increasing membership fees, although naturally losses shouldn't always be carried by existing members often that will be the case – unless we can encourage new members and churches groups to join, so balancing out the losses of members and churches/groups throughout the year. Losses are not always because members don't want to stay with us, sometimes and sadly it is because our loyal members take their passing. So we can't be complacent. We need to know what the younger Spiritualist community wants and try to encourage a healthy balance between our mature members and the young this will help to make a very healthy very supportive knowledgeable growing secure organisation well into the future. Breakdowns such as illustrated below help us to know where most of our income comes from.

Example of Membership Breakdown to give you an idea of how it's done, it's a bit fiddly because some members of course hold more than one membership type. So you must only include their fee in one category or the other. This one is already well out-of-date it is only a starting point. This isn't really a difficult job it's just a bit awkward because Excel won't do everything for you. Keeping a history of older breakdowns will make for a clearer forecast of what the trend is and what is happening within AUHS memberships possibly leading us to understand what we need to do.



## Membership Secretary Procedure List



### Probationers

We have 29

Breakdown as follows:-

OAPs	5 x £20.00	£100.00
Paying Full Fee	24 x £25.00	£600.00
		<b><u>£700.00</u></b>

### Ordinary

We have 21

No reduction for OAPs 21 x £12.00 **£252.00**

### Healers

We have 102

Breakdown as follows:-

OAPs	49 x £20.00	£980.00
Paying Full Fee	54 x £25.00	£1,350.00
		<b><u>£2,330.00</u></b>

### Healer Leaders

We have 21

Breakdown as follows:-

OAPs	13 x £20.00	£260.00
Paying Full Fee	7 x £25.00	£175.00
		<b><u>£435.00</u></b>

### Free Members

Two Free members

### Ministers

We have 5 (Ministers pay £10.00 extra)

Breakdown as follows:-

OAPs	Healer Ministers	2x£30.00	£60.00
Paying Full Healing Fee	1x£35.00		£35.00
Paying Ordinary Fee	1x£22.00		£22.00
Free member	1x£00.00		<b><u>£117.00</u></b>

Churches/Group 27 - Affiliation Fee £10.00 **£270.00**

**Total Income £4,104.00 per year**

46

