

# Section Membership Data Collection Guide

Thank you in advance for your valuable time and effort in providing your membership records to National!

This guide explains the process for how to share membership rosters between NCJW Sections and National, provides the template to use, and outlines how to complete the template. *Please take time to read through this entire guide.*

Completing this process will be mutually beneficial to both Sections and National. National will back up Sections' membership records in the National database, provide Sections with information on individuals' congressional districts, and return addresses that have been verified by our third-party data service. National will also provide a list of contacts in the Section's state who are in the National database and not yet connected to the local Section.

All Sections are required to send National their membership rosters in order to be considered a Section in good standing, [per NCJW bylaws](#) (see pages 22-23).

Please format the Section membership roster to match [this template](#) and send your spreadsheet to [action@ncjw.org](mailto:action@ncjw.org) by Sunday, January 31 at midnight. Label your template "SectionName Membership Data MM-DD-YYYY" such as "San Antonio Section Membership Data 01-15-2021." Please read below for the frequently asked questions which provide more details on how to complete this process and an overview and explanation of all of the data fields in the template.

*We piloted this process with nine Sections to streamline and optimize it. Thanks to Atlanta, Essex County, Greater Long Beach and West Orange County, Greater Philadelphia, Palm Beach, Rockland, San Antonio, SE Atlantic Rockland, and St. Louis Sections!*

## Frequently Asked Questions:

*Click the question to be relocated to the answers.*

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- [How does National use the membership data?](#)
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- [What are some lessons learned from the pilot Sections for this process?](#)

Questions about data format:

- [What format should we use to send our membership data?](#)
- [How do I use this template? How does using it differ if my section maintains records in a database or in a spreadsheet?](#)
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- [One of the data fields is required but our Section does not collect this information. What do we do?](#)
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## Overview of Data Fields:

[Download the template here.](#)

**Required fields:** *If your Section has the information for a required field, please include it. Only leave a required field blank if the Section does not have that information in their records.*

**For sections with dues-paying membership:** *In order to process a membership, our database must have the following information: membership level (column N), Current Membership Start and/or Purchase Date (column P), and Membership Expiration Date (Column Q). Please make sure these fields are complete for all memberships.*

- **Column A: RE ID (required)**
  - The “RE ID” is the ID number generated by National’s previous database Raiser’s Edge for each individual contact. Sections were provided the “RE ID” numbers in prior membership data reports received from National. This number was used to match people between Sections’ membership roster and the National database.
  - If you do not have this number in your records, you can leave it blank. If you have capacity to add this number to your database or spreadsheet when preparing your data, and don’t have a record of it, please contact [action@ncjw.org](mailto:action@ncjw.org) to receive the list of ID numbers for your members that we have in our records.
  - When National returns a Section membership list, it will include both the “RE ID” and “VAN ID” so the Section can associate both identification numbers with their contact records. The “VAN ID” is the new identification number generated by National’s new database EveryAction and will replace the “RE ID” this year.
- **Column B: First Name (required)**
  - This field is the first name of the member.
- **Column C: Middle Initial/ Middle Name (required)**
  - This field is any middle initials or middle name that the member uses on a regular basis.
- **Column D: Last Name (required)**
  - This field is the last name of the member.
  - *Tip: If you currently collect first and last name in the same column and need to separate them, use the [“text-to-column” feature](#) in Excel.*
- **Column E: Address Line 1 (required)**
  - This field is the first address line of the member’s primary residence.
- **Column F: Address Line 2 (required)**
  - This field is the second address line of the member’s primary residence, which should include apartment/unit numbers. For example, “Apt. 302”
- **Column G, Column H, Column I: City, State and Zip Code (required)**
  - These fields are the city, state, and zip code of the member’s primary residence. Please include the five-digit zip-codes. It is not necessary to include nine-digit zip codes.
- **Column J, Column K: Home Phone and Cell Phone (required)**
  - These fields are the home phone and cell phone of the member.

- Format phone numbers as ###-###-####, (###) ###-####, or #####.
- Phone numbers must include area codes.
- Do not leave any written notes in this column.
- **Column L: Email (required)**
  - This field is the email most used by the member, if they have one.
  - Please only list one email address in this field.
  - Members will automatically be subscribed to the National listserv if they are not already and they always have the option to unsubscribe if they wish.
  - Until the member [customizes their email experience](#), they will receive emails from National that are sent to the entire email list. The frequency of this averages once a week. Members can use [this link](#) to customize their National email experience.
  - Do not leave any written notes in this column.
- **Column M: Membership level (required)**
  - This field is the type of Section membership a contact has.
  - This field allows the Section and National to count how many annual, life, 3-year members, etc. the Section has.
  - If possible, please spell out the name of your membership levels. If you use an abbreviation, please provide National with the meaning of each abbreviation.
- **Column N: Is this a gift membership? (required)**
  - This field shows whether contact's current membership is a gift/complimentary membership. List "Yes" or "No" in this column.
  - If the Section does not know, please leave the field blank.
- **Column O: Current Membership Start and/or Purchase Date (required)**
  - This field is the date on which the member's current membership began. Please format the date as MM/DD/YYYY.
  - National's database requires a start/purchase date in order to process a membership.
  - If you do not know the exact membership start/purchase date for an annual membership, please default to using the first day of the fiscal year (07/01/YYYY).
- **Column P: Membership Expiration Date (required)**
  - This field is the date in which the member's current membership expires. Please format the date as MM/DD/YYYY.
  - If the member has a Life membership, please use the default expiration date 6/30/2068. This is the latest date available in our database and our placeholder for life membership expiration dates since these memberships don't expire.
  - National's database requires an expiration date in order to process a membership.
  - *Tip: If you need to copy information to a series of cells in a column, such as to copy an expiration date to multiple cells, [use this resource to learn how](#).*
- **Column Q: First Membership Join Date (required)**
  - This is the date on which the member's first membership to your Section began or was purchased. Please format the date as MM/DD/YYYY. If the Section does not have the full date, default to the first day of the known fiscal year (07/01/YYYY)
  - The "Current Membership Start and/or Purchase Date" and the "First Membership Join Date" will only match for new members who's first membership

is the current one. For members who have previous memberships to NCJW in addition to the current one, the “First Membership Join Date” will differ.

- **Column R: Birthdate (optional)**
  - This field is the member’s birthdate and should be formatted as MM/DD/YYYY.
- **Column S: Deceased Date (required)**
  - This field notifies National that a member has passed away. Please format as MM/YYYY. This date can be either the month and year the person passed away or when your Section was notified. If you do not know this information, but know someone has died, you can mark an x in the cell.

## Frequently Asked Questions:

### How will Sections benefit from sending National membership data?

- Section membership data will be reconciled with the National database. The updated membership and advocate rosters will be returned to Sections. Upon return, Sections will receive:
  - Updated addresses for their members. National uses a third-party data service to validate and update all addresses based on the National Change of Address (NCOA) database that the USPS uses to verify mailing address changes. We coordinated the timing so that all addresses will run through this service before we send data back to sections in order to provide sections with address changes.
  - Each Section member’s federal and state congressional district for advocacy purposes.
  - A list of new contacts in the Section’s state. Once we have been able to import Section membership data into the National database, National will identify contacts in the database who are located in the Section’s state but are not a Section member and have been active within NCJW in the past year. These individuals have not been included on the weekly list of new contacts that Sections receive because they existed in our database prior to September 2019. National will include the contact information for this list of potential Section members. The best way for advocates to get involved in our mission is to be active in their local Section. We hope the Section invites these NCJW advocates to get involved.
- National maintains Section membership data in our database as a backup in case a Section loses their data.

### How does National use the membership data?

- According to the NCJW Bylaws, to be a Section in good standing, Sections need to send their membership data to National. In an effort to streamline this process, National plans to collect this information annually. It was previously collected on a quarterly basis.
- Section data is used to update records in the National database in order to maintain accurate information. National has collected Section membership data for decades. The Section data collection process plays a vital role in maintaining up-to-date records.

- National will be better able to analyze our membership base across the country, Section sizes, membership types, and membership growth.
- Section members often reach out to National for various requests. Having their individual contact information in our database allows us to better serve them and help them access national resources such as webinars and conferences. In addition, being aware of Section affiliation enables National to best direct member inquiries to Section leaders as needed.
- Email NCJW advocates occasionally to build a cohesive national movement and mobilize for urgent social justice issues.

### **Will National use these lists to contact our Section members?**

- Section members will automatically be added to National's email list. They will receive emails that are sent to all NCJW advocates, approximately once a week.
- Individuals can unsubscribe from National emails at any time or customize their email experience to receive emails based on their interests or sign up for the Weekly Wrap Up Newsletter. This gives them the control over whether or not and how frequently they want communications from National.
- Sections can also request that all of their members are added to the Weekly Wrap Up Newsletter, which sends every Friday afternoon. This email includes a roundup of advocacy actions to take, updates on the issues we care about from our legislative experts on Capitol Hill, recent news articles about NCJW's work, and weekend reading suggestions. Include this request in the email when you send National your membership data spreadsheet.
- For more information on National's privacy policy, visit <https://www.ncjw.org/privacy/>

### **What are some lessons learned from the pilot Sections for this process?**

- If your membership data lives in a spreadsheet, save an original copy as back-up before you start reformatting your data.
- Start early and avoid procrastinating.
- This process takes time, so pace yourself. Instead of doing the work all at once, consider doing it in more manageable portions.
- Ask questions if you have them to ensure you're completing the template properly. Email [action@ncjw.org](mailto:action@ncjw.org) with your question.

## **Questions about Section membership data format**

### **What format should we use to send our membership data?**

- To ensure a smooth process, please use [this template](#) to send the Section's data. National can only process data in this template. Read the Section "Overview of data field" for details.
- Please send the Section's membership data in an editable excel spreadsheet (such as .csv or .xlsx).

## How do I use this [template](#)? How does using it differ if my section maintains records in a database or in a spreadsheet?

- Each row of the spreadsheet should capture data for one Section member.
- Complete the data in the required fields. Please only leave a required field blank if the Section does not have that information in your records. Please do not leave the columns blank for 'membership level', 'current membership start and/or purchase date', and 'membership expiration date' unless a contact does not have a membership. These three fields are required in order for the National database to process a membership.
- For Sections using a database to house Section membership information, export a spreadsheet with the data fields listed in [the template](#) and arrange the columns to match the formatting of the template. Some minor manual data adjustments may be needed.
- For Sections using a spreadsheet to maintain the membership roster, please reformat your spreadsheet to match this template.

## Our Section has eliminated memberships. How do we complete this process?

- Some Sections no longer have memberships but instead have supporters, donors, advocates, etc. Please send us your list of these individuals and any others affiliated with your section. Complete the contact information fields just as you would if these individuals were traditional members. Then, you can leave the membership specific fields blank, except for writing NCJW Advocates in the membership level.

## One of the data fields is required but our Section does not collect this information. What do we do?

- If this is the case, then the Section can leave out this information. As noted above, please do not leave the columns blank for 'membership level', 'current membership start and/or purchase date', and 'membership expiration date' unless a contact does not have a membership or your section has eliminated memberships.
- We suggest that Sections collect all pieces of information listed in the template for members going forward.

## Can we submit our data if the formatting doesn't match this template?

- No. Due to the requirements of the National database, National can only accept data formatted in this template.

## We maintain all of our records in a spreadsheet. Should we maintain our records in this template going forward?

- Yes, National recommends that Sections who maintain their membership records in a spreadsheet use this spreadsheet as the master file for the future. Once the section prepares their data with the formatting of this template, National encourages sections maintain their records in this template going forward. In coming years, we will collect data using this template, so maintaining Section records using this template will optimize Section time in the years ahead.

- If your Section records include data that National has not requested, Sections can continue to collect that information in their newly formatted master spreadsheet. Those columns should be deleted from the version the Section sends to National.

***If you have concerns or questions about your membership roster, please contact [action@ncjw.org](mailto:action@ncjw.org).***