

## APPENDIX C

# RECORD KEEPING

### SETTING UP AN EXCEL FILE

(Courtesy of Jan Goodmundson – RS of Old Dominion Region)

Dear DCs, Keeping club records is often a challenge for the District Commissioner and can result in multiple files and stacks of papers! Information on membership is valuable to you and to future leaders of the club as well as to the members themselves. You may be called upon to write a letter of recommendation for club members who are applying for college, scholarships, upper level ratings and International Exchanges. That is when you will most appreciate having all of the information readily available to you. Also, it will eliminate the need to keep multiple pieces of papers and reduce the amount of storage space needed to handle your club records.

Club Record Keeping can be delegated by the DC to the club Secretary or any other party as felt appropriate and dependable.

Happy record keeping!

### Club Membership Data Worksheet

Name of club:			Date Registered:		
Club #:			EIN:		
Chartered Territory:					
N-new member    NPR-new member joining after Sept. 1    NT-new to club, transfer from another club					
Mbr #	Last Name	First Name	DOB	Date Join	Member Status (use key above)
1	Smith	JoAnne	12-15-96	1-1-05	N
2	Johnson	Kim	3-17-89	10-6-06	NPR
3	Williams	Todd	6-4-86	3-6-06	NT

The Club Membership Data worksheet is the worksheet that will provide historical information on club membership. Set up an Excel worksheet as shown above. And then to make it a useful tool for your club, follow the steps below.

1. Each time a member joins the club for the first time, either as a member new to Pony Club or a member transferring from another club they should be listed on this worksheet.
2. Start the data entry by assigning each new or transferring member a member number.
3. Enter all requested data on each new member on the club Membership Data worksheet.
4. Once all data is entered on the Club Membership Data worksheet click on file, select save to save your data entry.



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The Master Member worksheet is the worksheet that you will use to input information on individual members. Set up an Excel worksheet as shown above. And then to create a worksheet for each member, follow the steps below.

1. Right click on the tab at bottom of worksheet named Master Member Sheet.
2. Select “Move or copy” in the list of choices.
3. Highlight “Master Member Sheet” from the list of choices, click the box before “create a copy” and select OK.
4. You will now see a tab at the bottom of the workbook with the name “Master Member Sheet 2” – right click this tab, select rename and rename this sheet by inserting the member number, using the member number vs. name will make it easier to find this member sheet at a later point when there are a lot of members entered for the club (10 years in future for example).
5. Right click the tab with the new member number again, select the “move to end”, click OK and this will move your newly created sheet to the end of your workbook and will have all of your sheets in numerical order.
6. Be sure to enter all info for new members and update info on individual member sheets on a regular basis to keep data current.
7. If you should track attendance you can do so on the individual Member Sheet and at the end of each year add a new section in for the new year to come.

### **Looking for Member Data when you have a lot of club members entered**

Once there is a lot of Member worksheets and you want to find the data specific to a member go to the Club Membership worksheet and in the toolbar select Edit; select find and in the window that pops up in the box next to “find what” enter the last name of the member that you are searching for and select “find all” and a list of all members with that last name will appear telling you in which row you can find that member listed if more than one member with same last name. You can then check each of those listed to find the correct one and then go to the corresponding Member Worksheet with that member number on the tab.

### **Keeping Paper Records**

It is advised that at the end of each Pony Club year when “cleaning out paperwork” you keep a copy of the original signature medical release for on every member for a period of at least 7 years past their age of majority which could mean a period of 20 years! You can discard copies of the Member Report Form sent to USPC once you have a new one for the coming year. If you have any questions on keeping records or discarding check with your RS or call Member Services at the USPC office.

