Cleaning up VMN-VMS Membership Rosters: 'Inactives'
Steps to Take and Other Useful Information

You have members who are no longer active in your chapter, but still listed that way in their VMS profile status. They may have moved, transferred, or no longer want to be part of the program. It may also include those trainees who didn't graduate and are past their one-year make-up period.

Your Annual Report and our VMN 'active' membership numbers should be as accurate as possible in the VMN reports we send to our federal, state, and sponsoring agencies, who we rely on for funding the VMN program.

THE GOAL IS TO UPDATE and KEEP CURRENT YOUR CHAPTER'S VMS ROSTER, DETERMINING and MARKING THOSE WHO ARE NOW 'INACTIVE'. (Reminder: <u>never delete</u> a member.) That is, VMN volunteers should report some amount of volunteer service hours on chapter-approved projects during the last two consecutive calendar years to retain "VMN Member" status. (Exceptions can apply, as noted.)

Why important? See FAQ document

FOUR HELPFUL STEPS TO ACCOMPLISH THIS

STEP 1. **Go through your member roster on the VMS** and note the ones who have <u>not reported any</u> volunteer service hours for the last <u>two consecutive calendar years</u> (to accommodate new trainees and those with special personal reasons.)

How? It's easy!

- Create a VMS "hours" report, using a date range from the last two calendar years to present. Then go to the bottom of that report to find all those members who have not logged in hours within that date range. Save a list of <u>all these who have not **volunteered**</u> during the last two years, because they are the ones you will need to contact (even if they have paid dues.) (Reporting only continuing education hours do not fulfill the requirement.)

STEP 2. **IMPORTANT!** You will want to attempt to contact these lapsed members. (You may want to enlist a committee to help track them down.)

1. You will want to **ask what their intentions are, regarding performing and reporting volunteer service in the coming year**. They may still wish to be an 'active' member but just need to be nudged, or they may have had health or computer problems. They may have moved or no longer wish to be a volunteer with our program. (This is normal!) And it shows them that you miss them.

2. **Very important: you <u>must explain to them what being 'inactive' means to them and their future endeavors</u> so they know not to represent themselves as a VMN if made 'inactive'.**

   Explain via email, snailmail, or directly:
   What it means to be 'inactive' and a now former VMN member:
   1. They can no longer represent themselves as a Virginia Master Naturalist in public or while doing chapter-approved volunteer service.
   2. They are also not covered by VT liability insurance.
   3. They will no longer be able to access their records or profile in the Volunteer Management System.

- Remind them that the important purpose of a VMN is to aid the conservation and management of our natural resources through their volunteer service, not just by paying dues.

- You might find it easier to send a bulk blind-copied email to all of them relating the above two items, and to ask them <u>to respond to you by a certain date</u>. (A second or third email should be sent, in case the first one went unnoticed.) If you've not heard back after your deadline, you can confidently mark them as "inactive". If they care, they will contact you.

- Long-standing active members may be able to help you recognize those who have moved, etc.

STEP 3.   Change their statuses in the member's profile in the VMS, if needed, so that your Chapter's Annual Reports will reflect this and be as accurate as possible.

STEP 4.   List the reason and the date of inactivity once you've heard back, in the comment box.
- The **comment box** in each VMS member profile is a good place to write in:
    1. the reason for their inactivity and status change, along with
    2. the date they were made inactive (<u>very</u> important for document retention requirements, see below.)

That way, future Membership Chairs and Recordkeepers will know the reason and not have to contact them again.

- Members aren't able to see this box. Only those with VMS administrative permissions are able to read it. *You can write up to 1000 characters in this comment box now.*

Again, ***please don't ever delete anyone,*** *even a trainee who didn't finish the BTC*. We need to be able to have a record of all who graduated from or started the VMN program. Plus, you may find that some members have just taken a break for work, family, or health reasons and will return to the chapter in the future. Their lifetime hours will be there when they return. Also, do not delete their email from their profile – this is the way the system keeps track of them, and will also delete that email from any other chapters of which they were or are now a member.

<u>**Inactive former members can be reinstated**</u> by contacting a Chapter Board member to confirm their renewed interest in volunteering and recording hours on approved projects. At that time, the Membership Chair/Recordkeeper will reactivate their VMS record by changing their status back to "VMN member". If taken off any other membership lists, like email and newsletter, they will need to be added back onto those. If it has been more than a year or two since the former member was active, we suggest that a board member meet with the individual to review current chapter procedures, approved project opportunities, and any changes in policies.

It's simple!

<u>**Document Retention of those made Inactive***</u>
The Membership Chair/Recordkeeper will want to make sure to keep records of the date when former members were marked "Inactive". (The VMS member comment box is a good place for that.) All of their confidential paper records ***are required to be kept five years from the date of the last 'inactive' status change***. After that period, those papers can be shredded. (However, their VMS records remain forever.)

<u>**Just to reassure you**</u> **–** having a smaller number of active members does not mean that your chapter has 'failed'! As research has shown, it is normal that volunteers across any organization may move on to help some other beneficial cause after a period of time. And <u>it **doesn't** look bad for the VMN program.</u> In fact, we'd rather have a smaller number of active members who truly are volunteering their time to our mission than see a larger number on paper or people who are just paying dues. We don't want to share false membership numbers.

<u>**Please read the "Frequently Asked Questions and Concerns" document**</u> for answers to the most common questions. This will help you better explain it to the members you contact.

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BIG TAKEAWAY: FOR OUR PROGRAM PURPOSES, the LIABILITY POTENTIAL, and PROMISES WE'VE MADE TO OUR PARTNERS, WE DO NEED TO UPDATE THOSE INACTIVE MEMBERS ASAP.
This is really important **to represent our volunteer numbers accurately**.
We need your help to keep your roster up-to-date.
If you have done this already, thank you. If not, please work with us now to accomplish this.

Contact the VMN State Office if you have any questions or concerns about how to proceed.
This is very important and we're happy to help however we can!

* See *Records Retention Schedule* for more details (found on our VMN website and in the VMN Volunteer Policy Handbook)