

## **MEMBERSHIP SPREADSHEET (MOs)**

Once an organisation has decided that it wishes to become a Membership Organisation (MO), allowing it to submit membership details in bulk (making payment by cheque for the total), it will be provided with an Excel template for the recording of members' details.

***IMPORTANT NOTE #1: It is essential that the format of the template should not be altered in any way. Changes would prevent the processing of the submitted information.***

***IMPORTANT NOTE #2: It is essential that only those memberships being paid for through the MO are included on the spreadsheet. If the member has already joined or renewed directly with the ECF, he or she should NOT be included in the spreadsheet.***

***IMPORTANT NOTE #3: Only 1-year memberships from 1 September to 31 August may be purchased through an MO.***

- If the individual wishes to buy a **3-year membership**, this should be done directly with the ECF, via the online system or by phone or mail

### **Established MOs**

Established MOs will be provided with two spreadsheets, one for new members and one pre-filled with the current details of the MO's members. This will save considerable inputting time, as only amendments, additions and deletions will need to be made.

### **New MOs**

An Excel spreadsheet template will be provided, to be completed with the details of members joining through the MO.

### **Other organisations (non-MOs)**

The ECF will accept bulk submissions of memberships from clubs and other organisations using the New Members spreadsheet. It should be stressed, however, that:

- Payment for the full amount of the memberships listed must be made immediately to the office (spreadsheets will not be processed until payment is received if there is no Framework Agreement in place, i.e. the organisation is not an MO).
- The discount of £1 per member available to MOs (for memberships submitted by 31 October) is NOT available to non-MOs.

## **Completing the Spreadsheet for New Members**

The following information is required on the spreadsheet:

*Title* - Select from the dropdown list.

*Last Name*

*Initials*, i.e. the initials of all names, except the last name (e.g. if the member's name is John Nicholas Smith, you would enter "JN")

*First Name*

*Gender* - Select "Male" or "Female" from the dropdown list.

*Date of Birth* - This is mandatory for Juniors, in order that the ECF can confirm eligibility for junior membership. The information is helpful in matching all members to the correct entry in the Grading database, but it is not mandatory for Adults. The field is formatted to show the information in the required long date format (e.g. 31 January 1999).

*Email address* - This allows the member use of the online membership system. Please provide this information wherever possible.

*Address1* - 1<sup>st</sup> line of address

*Address2* - 2<sup>nd</sup> line of address

*Address3* - 3<sup>rd</sup> line of address

*Town*

*County*

*Postcode*

*Country* - Complete only if not England

*Home phone number* - Optional information

*Mobile phone number* - Optional information

*Club* - Mandatory (critical information in matching members to the grading database). If applicable, enter "None".

*Grading reference (e.g. 123456A)* - This is critical information in matching members to the grading database. If not known, the Grading Reference may be found in the online grading database. If none, leave the field blank.

*Group name* - Select the required membership category from the dropdown list. As noted above, it is only possible to purchase 1-year memberships using this spreadsheet.

*Amount paid* - Enter the correct amount for the membership category selected.