

ARCS® FOUNDATION, INC. CHAPTER WEBSITE CALENDAR OVERVIEW For Data Administrator Reference

Chapter Data Administrator (DA) Responsibilities

This is a suggested timeframe that may vary based on your Chapter calendar. National compliance requires current membership and scholar award data entry into the website. You are welcome to use the information here to create your own Chapter Data Administrator timeline. If you need any assistance, contact is.help@arcsfoundation.org

Manage Contacts Contacts/ Memberships	July 1- July 31	<ul style="list-style-type: none"> ✓ Finalize updating contact records and user roles for the Board. Renew continuing Board Memberships and add new Board Memberships. Update Board Relationships, Board Groups and User Roles. Set the “Member Since” and “Start Date” according to chapter conventions. Chapter Board Members going off the Board will have end dates that automatically expire on July 31.” ✓ If your chapter has new Officers that need to have an arcsfoundation.org address such as President, Data Admin and/or Content Editor; notify the IS Committee Chair so that your Chapter’s organizational email addresses can be redirected. ✓ If not already done, finish updating all Chapter Annual Memberships, Relationships, Groups and Tags. Don’t let memberships expire on July 31 unless the member is not returning. ✓ Check the Profile sidebar report “Chapter Roster” for completeness/correctness. If not, make corrections on contact records.
	Ongoing	<ul style="list-style-type: none"> ✓ Manage Contact Records: <ul style="list-style-type: none"> ✓ to reflect <u>any</u> changes in existing Member Contact Records and Chapter Roster. This includes contact info, communications, demographics, etc. ✓ to add new members and provide access through “People.” ✓ to find and merge duplicate contacts (ask for assistance, if you are new at this) ✓ to update any change to the positions of Officers and Directors ✓ to update any changes in University, Donor, and other Contact information ✓ to update any changes in any contact record tabs such as demographics, communications, etc. Pull up the contact record and select edit to make these tab changes the easiest.
Groups	July 1	<ul style="list-style-type: none"> ✓ Set up mailing Groups for your Chapter as needed. ✓ Review all Groups and disable Groups that are not in use.
Contributions	Ongoing	<ul style="list-style-type: none"> ✓ Work with the Chapter financial team to post contributions as needed
Scholar Awards (For Data Admin with Scholar Focus)	October 15	<ul style="list-style-type: none"> ✓ If not already done, enter new scholars into database and update Relationships, Groups, Tags (if applicable), and Awards. Be sure to select the “Contact Type” as “Scholar.” ✓ Assign user accounts to new scholars using the “People” menu option in the top black bar Drupal menu. ✓ Update continuing scholar Relationships, Groups, Tags (if applicable), and Awards. ✓ Send email to both new and continuing scholars with instructions on how to login to the website and update his/her profile record (should be done before any money is distributed to scholars). A sample email is available from is.help@arcsfoundation.org.
Document Library	August 1	<ul style="list-style-type: none"> ✓ Post any missing records of previous fiscal year in Document Library. If access to the “Financial” folder needs to be adjusted notify is.help@arcsfoundation.org.

		<ul style="list-style-type: none"> ✓ Archive previous year's materials in "Historical Records Folder" in Document Library.
	Ongoing	<ul style="list-style-type: none"> ✓ Immediately after each Board Meeting: Post Approved Minutes, Meeting Materials, and other Documents to the Document Library.
Events	Ongoing	<ul style="list-style-type: none"> ✓ Events that are repeated each year can be copied and updated. This is easier than creating templates. Add events as information comes in. When you want an event to be available on the public site, go under "Configure" and select this option. Do not make events public until they have been tested. If your Chapter does not have a payment processor, please inquire how to sign up for one to reduce manual event data entry. ✓ Price sets vary based on how complex the registration fees are. If needed, ask for assistance from is.help@arcsfoundation.org. ✓ A variety of profiles are available to collect and/or enter participant data. If you need assistance selecting a profile or need to set up a new profile, contact is.help@arcsfoundation.org.
Manage Contacts Contacts/ Memberships	Jan 1 to June 30 (The timing of these tasks will vary based on your Chapter's timeline)	<ul style="list-style-type: none"> ✓ Determine the timeline for your Chapter membership renewal, new member selection as well as new Board selection. If your Chapter does not have a payment processor, please inquire how to sign up for one to reduce manual membership data entry. ✓ Make sure the online membership renewal page under the Profile sidebar "ARCS Membership" is updated in time for your Chapter Membership Renewal drive. Ask for assistance if this sidebar menu item needs to be updated or if your Chapter needs to create an "ARCS Membership" Profile to be accessed from this Profile sidebar menu item. ✓ Create a draft email for members with information on how to login to renew an online membership and update their Committee Interests and Volunteer Skills. Send out the email at the appropriate time. ✓ If you are not using online membership renewal, you must manually enter the membership renewals and dues payments. If your Chapter does not care to record the dues payments, but wants to keep renewal dates current as members renew, the job can be made easier using Bulk Membership Renewal. If this is the first time you are doing bulk membership data entry, ask for assistance. Even if your Chapter does not use Online Membership Renewal, members should be asked to login to update their Committee Interests and Volunteer Skills under the profile sidebar "Getting to Know You." ✓ Check your Membership Dashboard to view status of renewals. You may also set up Membership Reports to track your renewals. ✓ Be consistent in how you enter "Member Since," "Start Date," and "End Date." "Member Since" date is the start of the fiscal year the member joined ARCS and should be the same as the "Start Date." The "End Date" is the end of the fiscal year and is renewed each year either through online membership renewals or manual data entry. Bulk Membership Renewal can help this process. ✓ If not already in the database, create contact records for new members. Add new member user account access through "People." Update Relationships, Groups and, if applicable, Tags. Set the "Member Since" and "Start Date" according to chapter conventions. ✓ If your Chapter has a transition Board meeting, create the new Chapter Board mailing group. When you no longer need the previous year group for a mailing, disable or delete it.
Manage Mailings	Ongoing	<ul style="list-style-type: none"> ✓ Assist President and/or other Chapter officers in mailings as needed. ✓ Email mailing labels to Committee Chairs who need them.
Reporting	Ongoing	<ul style="list-style-type: none"> ✓ Create new reports/update existing reports as needed for your chapter.

