



SPECIAL OPERATIONS ASSOCIATION

MEMBER MANAGEMENT SOP

Version 1. 2011
Updated 2013
Updated 2015
Updated 2019
Updated 2021
Updated 1/15/ 2022

FORWARD

This SOP was developed to outline the duties and responsibilities of the Membership Committee, procedures in vetting new member applications and maintaining the Member Management Database.

The database is a members' driven database designed to collect, retain, and track member activities. The information collected is sensitive and care should be taken to ensure it is not compromised and is only available to the Membership Chairman, Systems Coordinator and Registrar.

Requests for data should be addressed to the Membership Committee in writing. The request should detail the information requested and the purpose for the request.

This guide is part of Membership Committee Annex published on the SOA website and is on the OneDrive web account managed by the Systems Coordinator Committee, Morris Worley, Chairman and Ray Frovarp.

Morris Worley, Systems Coordinator
919-619-2401

Ray Frovarp, Committee Member
910-850-6023

MEMBER MANAGEMENT STANDARD OPERATING PROCEDURES

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SPECIAL OPERATIONS ASSOCIATION

MEMBERSHIP MANAGEMENT MANUAL SECTION 1

I TRANSITION DUTIES AND RESPONSIBILITIES TO AN INCOMING CHAIRMAN

- A. The incoming chairman of the membership committee shall accept responsibility of the committee on January 1
- B. Training – The outgoing chairman will arrange a meeting to provide an orientation meeting outlining the duties and responsibilities of the Membership Committee.

II MEMBER DATA STANDARDS

A. CHAIRMAN RESPONSIBILITIES

- 1. The Membership Chairman is responsible for maintaining and ensuring the confidentiality of all member records in the SOA database.
- 2. All files are considered as confidential documents.
- 3. The information contained in the database will only be available to the Membership Chairman, Registrar, and Systems Coordinator.
- 4. At no time will the database be shared in any form without prior approval.
- 5. The database cannot be emailed, placed on a thumb drive, given, or shared without the express permission of the Membership Chairman and Systems Coordinator.

B. REQUESTS FOR MEMBERSHIP DATA

- 1. Requests from **INSIDE SOURCES** (BOD, Special Staff, member to member, etc.)
 - a.) Board Members and Special Staff – Data may be shared with members of the BOD and Special Staff for the purpose of conducting SOA business on behalf of the membership.
 - b.) Member to Member - No information will be given to a member about another member. However, the Membership Chairman may contact the member and advise someone is asking for them and provide the requesting members info.
- 2. Requests from **OUTSIDE SOURCES** (newspapers, media, etc.)
 - a.) Any requests of this nature will be forwarded to the Vice President of the BOD.

D. DATA COLLECTION AND STORAGE

- 1. The database is an annual database. This means that new information overwrites old information.

- a. The database backend must be uploaded to the Systems Coordinator and Membership cloud at least weekly
- b. Upload front and backends on Dec. 31 each year to ensure annual data analysis and comparisons are accurate.
- 2. Storage
 - a. Membership data is stored on the Membership Computer, Membership Cloud and on the IT Committee Chairman's cloud.
 - b. Paper membership applications are filed in storage boxes in alpha order.
 - c. Member applications are digitized and stored on the membership computer and on the System Administrator's (Membership) cloud.
- 3. Types of data collected (Appendix 10)
 - a. History of AAR/PRP mail lists; Reunion attendance, member Stats

D. REVIEW HISTORICAL DATA TO IDENTIFY EMERGING TRENDS (APPENDIX 7)

- 1. History of membership – Types and status
- 2. Inactive/inactive/deceased/other by type and status
- 3. Growth or decline in individual types or overall population.

III COMMITTEE STRUCTURE, TIMELINE, AND ETHICS (APPENDIX 1)

A. TIME COMMITMENT

- 1. It is important to note that the Membership Committee is a twelve-month time commitment.

B. MEMBERSHIP COMMITTEE STRUCTURE

- 1. Chairman is responsible for recruiting, training, and ensuring Committee members are knowledgeable of the procedures and bylaws
- 2. A representative from each of the service branches, Army, Marines, Navy and Air Force will be identified to serve on the Committee.

C. MEMBERSHIP COMMITTEE STANDARDS

- 1. The Committee will ensure the confidentiality of all applications and documentation
- 2. Opinions rendered will be without prejudice or bias.

IV MEMBERSHIP COMMITTEE DUTIES AND RESPONSIBILITIES

A. RESEARCH UNITS FOR ADDITION/DELETION

- 1. APPROVED UNITS UPDATED JUNE 15, 2017
 - a. The approved Units List was updated to include those units published in the USSOCOM factbook.
 - b. the Motion read:
 SOA Agenda Item 2017.06.15.03: Discuss/approve new SOA Approved Unit list (Binford).
Director Binford briefed the BOD on a proposed new post 9/11 approved unit list based on the USSOCOM Fact Book. He highlighted that no changes were required to the SOA By Laws

and the essence of every membership candidate will be the vetting and ensuring the candidate meets all of the requirements as required by the By Laws.

Motion to approve was made by Secretary Vines, seconded by Treasurer Buscetto, and unanimously approved.

2. Pre 9/11 units, not currently on the list, will need to be researched and approved by the BOD prior to adding to the list
3. The approved units list will be maintained by the Membership Chairman and Systems Coordinator.
4. Updated lists will be placed on SOA website and on the Membership Cloud

B. COORDINATE WITH THE BOD AND SPECIAL STAFF

1. Registration Committee (in concert with the Systems Coordinator Committee and Registrar)
 - b. Prepare/update registration software
 - c. Prepare a list of members who have achieved benchmark tenure
 - d. Close out registration database at the end of the reunion.
2. Nominating Committee
 - a. Vet slate of nominees seeking for election to the Board of Directors as defined in the SOA bylaws.
 - b. Applicants must be members in good standing and have attended at least 1 of the past 3 reunions.
3. Tally Committee
 - a. Tally Chairman provides a list of ballots received
 - b. Membership Chairman vets eligibility
 - i must be a general member in good standing.
4. Brightlight Committee
 - a. BrightLight committee chair provides a list of candidates
 - b. Chairman vets' eligibility:
 - Type - must be a General Member
 - Status - must be in good standing (but may be waived in special circumstances)
 - Reunions attended, if any.
5. Scholarship
 - a. Scholarship Chair to provide a slate of candidates.
 - b. Chairman vet eligibility based on the criteria and bylaws.
 - Sponsor must be a General member in good standing
 - Sponsors are be vetted annually
6. Chaplain – TAPs
 - a. Upon notice of a member's death, the Membership chairman will contact the Chaplain with contact information for the chaplain to contact the Next of Kin.
 - b. Provide the Chaplain, and SOA Secretary, a list of deceased members to be published on the SOA TAPs website, AAR and PRP.

7. Warriors Widows
 - a. Verifies status of warriors' widows.

B. HONORARY MEMBERSHIP APPLICATIONS

1. SOA MEMBERS MAY PROPOSE A CANDIDATE FOR HONORARY MEMBERSHIP BY WRITTEN REQUEST.
 - a. Application and documentation must contain at least:
Contact information including, full name, address, phone (landline & cell), and email address
 - b. an abbreviated biography of the candidate.
 - c. Chairman will convene a committee of 3-5 members who will be tasked to review the Application and render an unbiased recommendation.
2. Chairman will meet with the Committee to discuss their recommendations and finalize a recommendation for the BOD
 - a. Final approval will be by the Board of Directors

V VET NEW MEMBERSHIP APPLICATIONS (APPENDIX 2; APPENDIX 3)

A. EFFECTIVE 6/18/2020

1. SOA paper applications for membership will no longer be published in the PRP/AAR or website.
 - a. However, they will continue to be updated and made available, to those who do not have access to a computer.
 - b. Review/update SOA online and paper application as required.

B. REVIEW APPLICATIONS (APPENDIX 2, CRITERIA; APPENDIX 3 APPLICATION)

1. Maintain a daily log as applications are received.
 - a. date received, name, contact information, etc.
records all activity on the daily log.
2. Applications without accompanying documentation.
 - a. contact applicant for documents via phone or email that the application will not be processed without documentation.
 - b. Non-response will void the application in 30 days
 - c. Application fee is non-refundable.
3. Assign a committee member to review the application and documentation.
Each application received should include:
 - a. An application with an original signature
 - b. A non-refundable application fee.
 - c. Supporting documentation:
 - Applicants must provide documentation that verifies the SOA approved unit, the location of where they served, dates and MOS.
 - approved docs, but not limited to DD214/215, Awards, CIB. Documentation.

- Optional - Sponsorship by an SOA Member who can verify they served, (boots on the ground), with the applicant.
 - i Contact sponsor via email or phone and notate application
 - ii. Verify that the sponsor understands the SOA definition of sponsorship, i.e., that he served with (boots on the ground) and has personal knowledge of the applicant's qualifications.

C. UPON APPROVAL ASSIGN TYPE AND STATUS

1. Committee Members will make recommendations for each application based on the merits and documentation provided to the committee; however, the applicants may apply for an upgrade if documentation is presented.
2. On Approval, assign SOA member type and status
 - a. Member Types
 - General
 - Associate
 - Operational Associate
 - Honorary
 - Warriors Widow (also assign widows a branch of service coded *Widow* in the dropdown box.)
 - b. STATUS is based on payment method – life or annual
3. Assign SOA member number to approved applicant
 - a. Membership numbers shall be issued sequentially
 - b. Unused numbers shall not be re-used
4. Membership Cards and Certificates
 - a. New Members will be issued a Certificate of membership and a member card.

D. APPLICATION NOT APPROVED

1. On denial, the Membership Chairman informs applicants of decision
 - a. Contact applicant via email, or USPS informing of committee decision.
 - b. Digitize the record

VI ANNUAL MEMBERSHIP RENEWALS

A. SOA STATUS

1. Annual status designates membership is renewed annually at a sum approved by the Board of Directors.
2. Life status designates the member has paid a one-time membership fee and is not subject to pay future membership renewal fees.

B. ANNUAL MEMBERSHIPS RENEWALS

1. Due in January of each year and considered late as of Feb 1 each year.

2. Annual reminders will be posted in the PRP, AAR and on the SOA website.

3. Members who have not renewed on or before January 31:
 - a. Member Status will change from Annual to Inactive
 - b. Member will be removed from publication mail lists.
 - c. Member will no longer be eligible for SOA benefits.

VII MEMBER TENURE AND PIN HISTORY

A. TENURE

1. Year 1 of tenure begins on the day of approval.

B MEMBERS ACHIEVING 20+ YEARS BENCHMARK TENURE WILL BE PUBLISHED IN THE PRP

1. Tenure Pins will be awarded at the annual SOA reunion.
2. The highest benchmark tenured members will be recognized at the SOA Annual Banquet.
 - a. All others will be presented at the General Membership Meeting

VIII FILE MAINTENANCE (see section II)

A. MEMBERS WITH MEMBER NUMBERS 1- 2240 WERE DIGITIZED CIRCA 2000.

1. Paper copies were destroyed.
 - a. These digitized files are in the form of CD's and have been copied onto thumb drives.
 - b. Digitized files are stored on the Membership computer hard drive and on the SOA cloud maintained by IT
2. Member records beginning with 2241 are digitized in electronic format. (with backup) to the SOA website Cloud.
3. Member records shall contain the original membership application and all other documentation that refers to his membership, as applicable.
4. Member database records will be noted in the event of death, change of status etc.

IX FINANCIAL PROCEDURES

A DEPOSITS

1. Members fees schedules are published in the PRP, AAR and SOA website.
 - a. Members may pay online or by Check
 - b. All monies should be processed as directed in the Treasurer's Annex.
2. Reconciliation Of Member Receipts
 - a. Treasurer will provide a monthly report of dues receipts for Chairman to reconcile to the database to ensure accuracy.

X DATABASE MAINTENANCE

A. EACH MEMBER IS GIVEN A TYPE AND STATUS

COMPUTER CODES FOR MEMBER TYPE AND STATUS			
Code	TYPE	Code	STATUS
1	General	1	life
2	Associate	2	annual
3	Operational Associate	3	inactive
4	Honorary	4	deceased
5	Warriors Widow	5	expelled
6	Unused Number	6	resigned
7	Not Qualified	7	unused
8	Vacant	8	not qualified
		9	Life Mbr no contact

B. TYPE – SEE BYLAWS FOR SPECIFIC DETAILS

- 1 General – Direct combat
- 2 Associate – indirect combat
- 3 Operational Associate – foreign military
- 4 Honorary
- 5 Warriors Widow
- 6 Unused Number
- 7 Not Qualified
- 8 Vacant

C. STATUS

1. Life Members - Members who paid a one-time fee
2. Active – Renew membership annually
3. Inactive – Members in arrears more 24 months
4. Deceased - Members who have been reported deceased
5. Expelled
6. Resigned
7. Unused
8. not qualified
9. Life Mbr no contact – Life members whom we have lost contact

XI ADMINISTRATIVE

A. SECRETARY REPORTS

1. AAR & PRP
 - a. TAPs report
 - b. Fee Structure and membership renewal reminder
 - c. Member Contact Change and NOK form (APPENDIX 4)
 - d. Annual State of the Membership report
 - e. PRP/AAR Mail lists of members in good standing. PRP and AAR mail list are the same.
 - f. 20+ year Pin Tenure recipients

2. IRS 501 c 19 percentages (APPENDIX 6)
 - a. Calculate the percentage % of current/previous members of a branch of the US military.
 - b. Report percentage to the Secretary and on the State of the Membership Board report in December or January each year.
 - c. Review Appendix 6 for instructions on how to calculate.

B. BOARD REPORTS

1. Report membership activity to the BOD at least quarterly
 - a. State of the Membership
 - b. Emerging trends

C. OTHER ADMINISTRATIVE

1. Man a table at the Reunion
2. Present a state of the membership report at the GMM, including:
 - a. total membership numbers, new members, deceased members
 - b. Membership trends
3. Review website information for accuracy

XII INFORMATIONAL SOURCES TO USE WHEN VETTING CLIENTS

- a. "Who's Who from MACV-SOG" by Steve Sherman.
- b. "Who's Who from Hotfoot/White Star" by Steve Sherman.
- c. Committeeman for SEAL qualification.
- d. Committeeman for Mike Force qualification.
- e. POC for 8240 AU qualification.
- f. Committeemen for current day operations qualification.
- g. Committeeman for STD qualification.
- h. Committeeman for Marine Force Recon qualification.
- i. Committeeman for US Air Force qualification.
- j. Committeemen for Army air assets qualification.

SPECIAL OPERATIONS ASSOCIATION DATABASE MANAGEMENT

SECTION II

This section discusses the database and provides a how-to approach to answer questions during the year.

If needed, contact the Systems Coordinator Committee for detailed instructions on how to proceed.

Ray Frovarp 910 850 6023, rmfrovarp@gmail.com
Morris Worley, w5201@aol.com, 919-619-2401

IMPORTANT NOTES:

1. Close the database before uploading or downloading files
2. Enter the date uploaded in Address line 2 in the AA Placeholder record to verify you are up/downing the latest backend.
3. The SOA database is an annual database, so information will be overwritten the next year so Upload the backend to the cloud on December 31 each year for historical data collection.
4. Upload the backend at least weekly to the Membership and Systems Coordinator Cloud. More often, when a large number of changes have been made. Keeping a fresh upload reduces the risk of loss of data.

XIII GENERAL INFORMATION

A. GUI – Graphical User Interface

1. The data (backend) is appended to the frontend.
2. Tables and queries are in the frontend
3. data is in the backend.

B. The database is a split database. Basic file names are:

1. SOAMbrMgtDb.accdb – Membership Chairman's front end
2. SOAMbrMgtDb_be.accdb – Membership Chairman's back end (data)
3. SOAR_registration_Manager.mdb – Registrar's front end
4. SOARregistrationdata.mdb - Registrar's back end (data)
5. Banquet Seating

C. Opening the Database

1. highlight the file; hold the shift key down and double click the file. This will stop anything from opening that does not need to be running. Only do this if you are working on the database, otherwise, open it in a normal fashion.

2. Do not open both databases at one time.
3. Upon opening the database if there is a SECURITY WARNING – CLICK ENABLE CONTENTS

D. File Extensions

1. As of this writing, Microsoft ACCESS recognizes the xls extension (format for spreadsheets, others, such as xlxs, is not accepted by the program.

E. Types of Queries

1. SELECT QUERIES DISPLAY DATA
2. ACTION QUERIES CHANGE DATA
3. Use view to display data
4. Do not use X queries
5. Button CK V! is an update query
6. Union query does not change data.

XIV CREATE A DIRECTORY

A. This section refers to first time chairs setting up the directories

1. Create a directory, preferably in drive C: for the member management database.
2. Other files such as xlSOARupdate and xlNewMemberReport will also be in this directory.
3. DOWNLOAD FILES FROM ONEDRIVE (contact The System Coordinator Committee, if needed)
4. Open OneDrive
5. Click Share, then SOA tab with the logo, then soammgt
6. Find file and double-click. Display appears at the bottom, click *save as* and paste to desired directory.
7. See linking tables in the section below

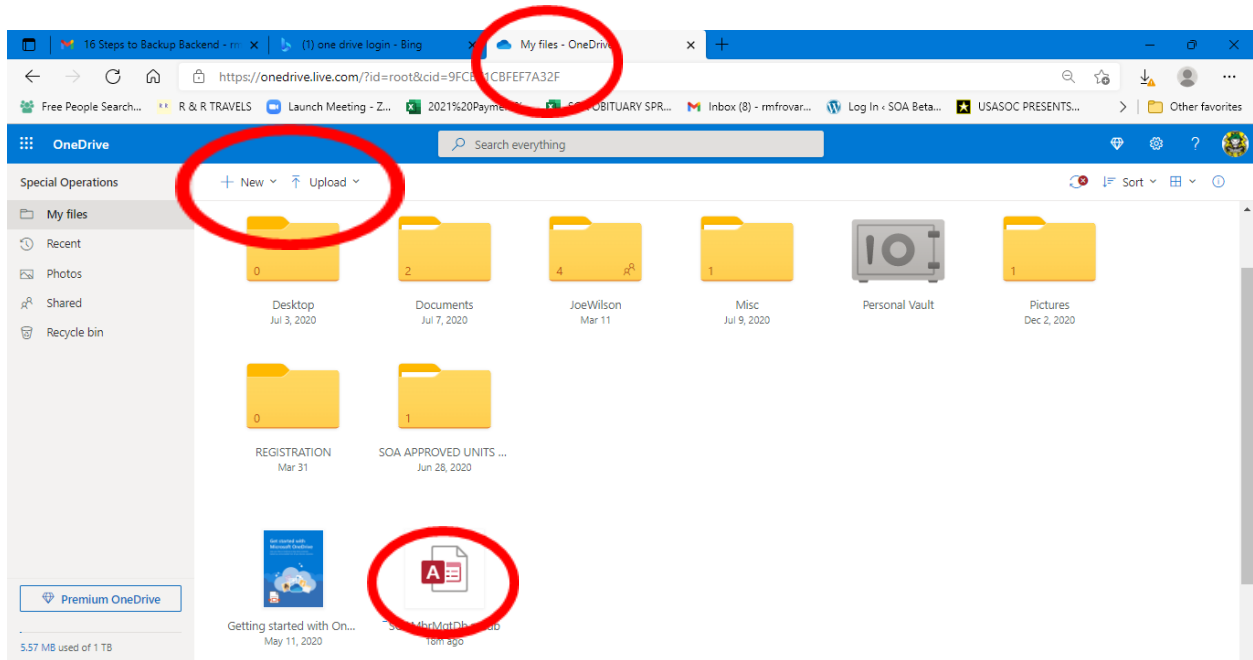
XV DOWNLOADING AND UPLOADING THE DATABASE

A. This section is for uploading or downloading the front and backend after the initial directory has been established

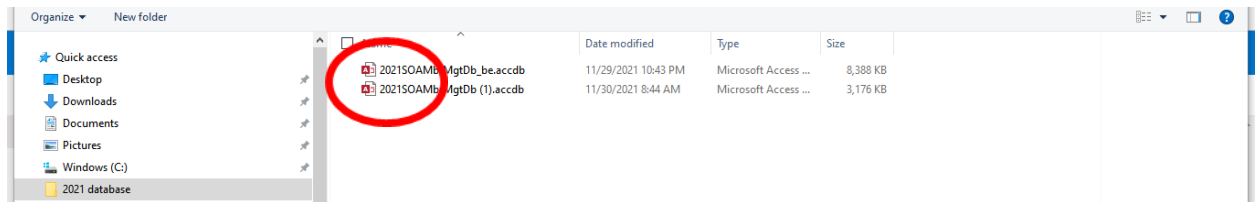
1. IMPORTANT: Be sure the database is closed before uploading/downloading files.
2. Files will be uploaded to the Systems Coordinator cloud as well as the Member Management Cloud.

B. UPLOADING files to the Member Management Cloud (this is password protected – keep the password in a safe place)

1. Click and open the Special Operations Cloud
2. When the cloud opens My Files will show
3. click Upload and (from the drop-down menu), choose files (not folders)



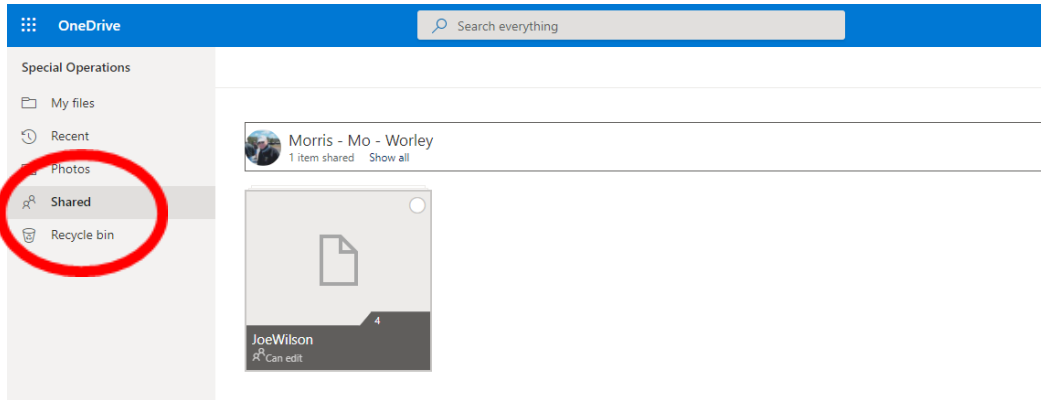
4. The file cabinet on your computer will open automatically:
 - a. Find the directory for the database.



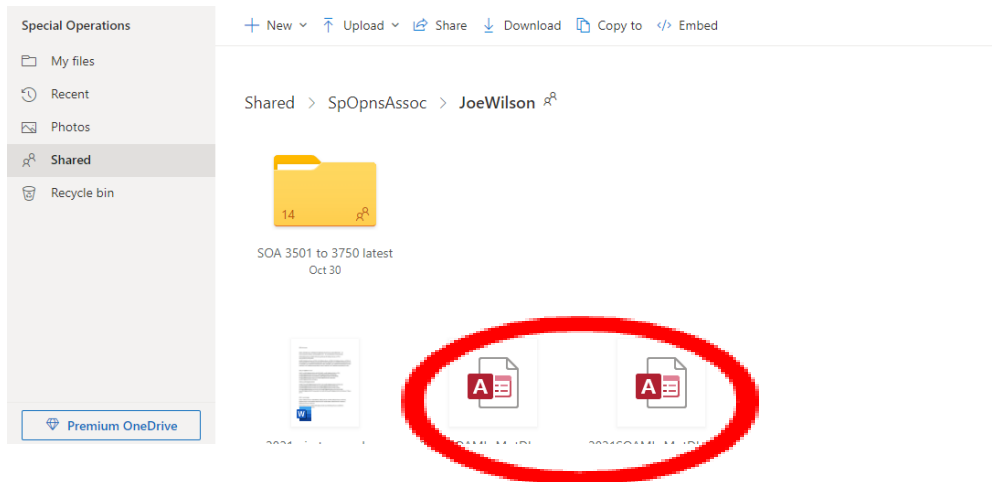
- b. double click the icon on backend file (extension is **be.accdb**)
- c. file will automatically upload to the membership cloud
- d. Maybe asked if you want to: *replace the existing file*
 - i. choose yes to replace
- e. Repeat the process for the front end.

C. Upload to the Systems coordinator Cloud (this is a shared folder on the cloud)

1. Using the same process as uploading to the Membership Cloud.
 - a. Click on the shared button to expose the System Coordinator's folder

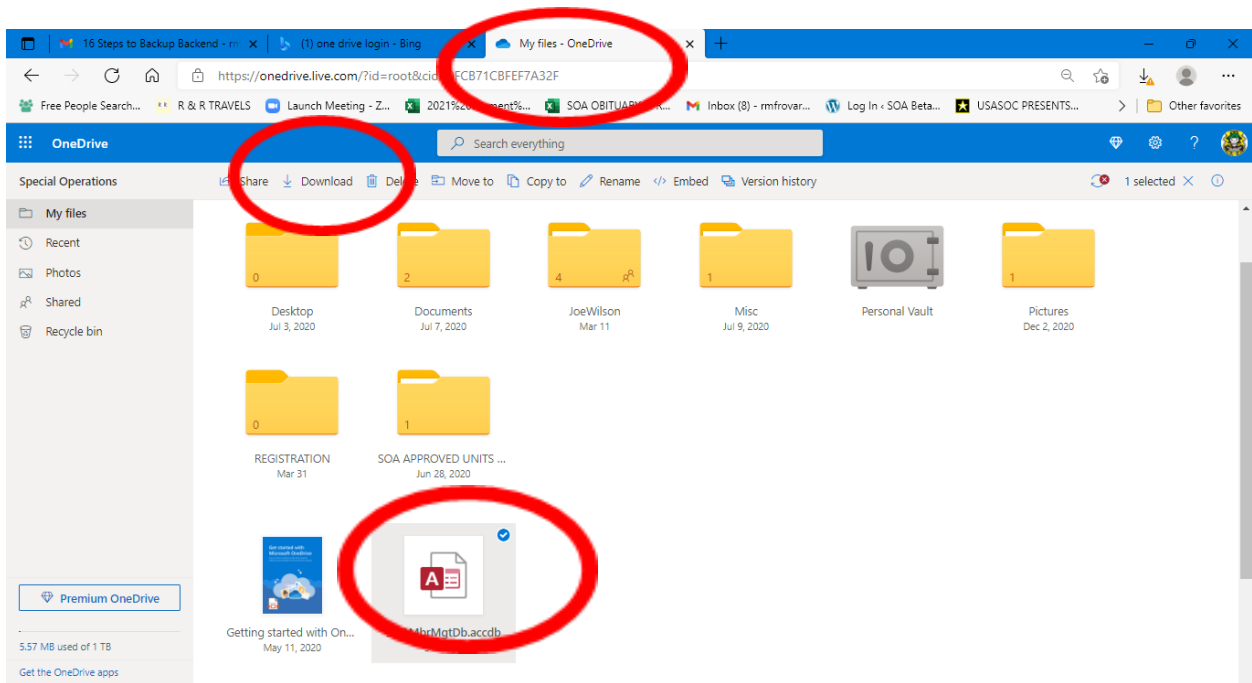


2. Click on the grey box entitled Joe Wilson to open the folder
 - a. Last updated files will appear in the folder.
 - b. Click upload, choose files (not folders)
 - c. C drive will open, find the database directory, and upload the backend and repeat for the front end.



D. DOWNLOADING DATABASE FILES (from the Mbr Mgt computer to the cloud)

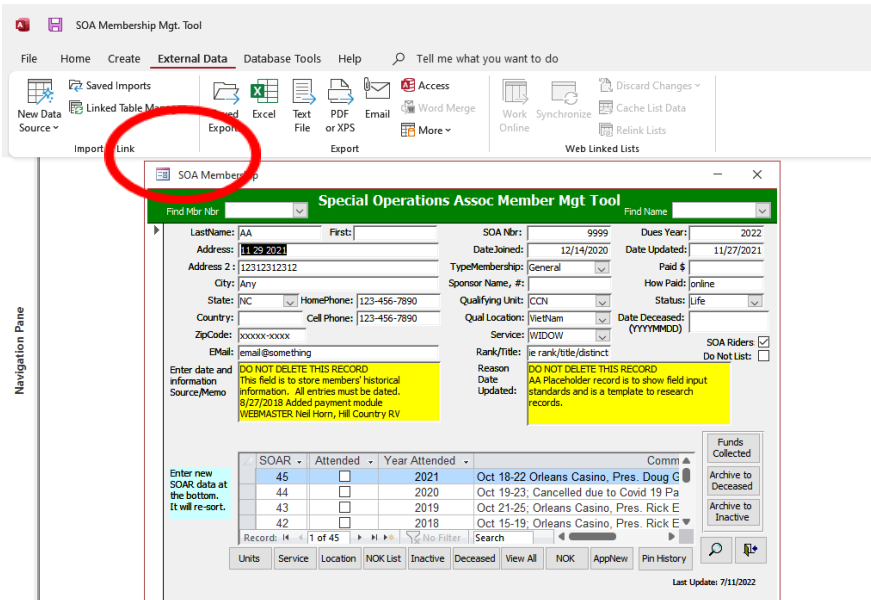
1. Click and open the Special Operations Cloud
2. When the cloud opens My Files will show the files and folders.



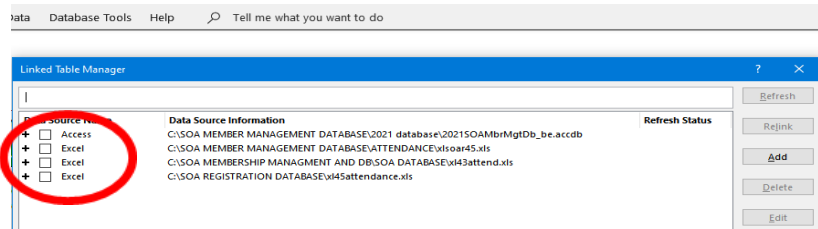
3. Click the white circle of the file you want to download
 - a. click download
 - b. C drive will open, find the database directory
 - c. double click to replace the file and download the new file
 - d. repeat for the front end.

E. USING LINKED TABLE MANAGER

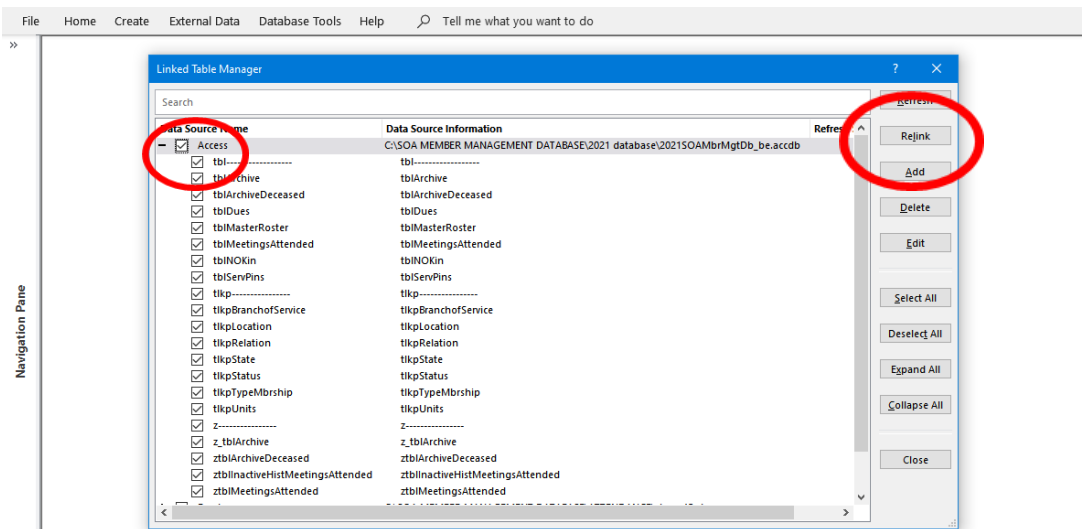
1. When a new download from the Systems Coordinator is required, the path may be broken and must be re-linked
2. Link the front and back-end files
 - a. Click External Data tools tab, then click the Linked Table Manager.



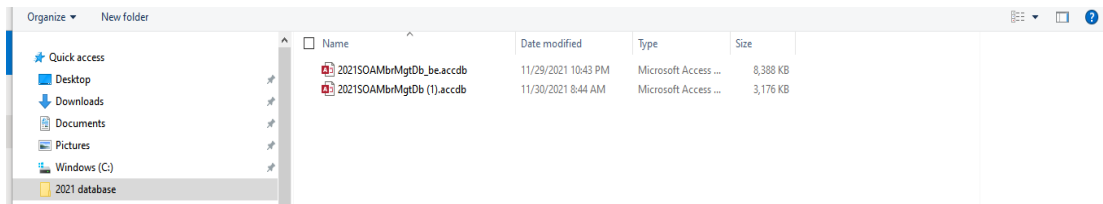
- b. The linked table Manager will open
 - i. Click the Access box
 - ii. then click the + to open the table view
 - iii. The tables view opens to expose all linked tables



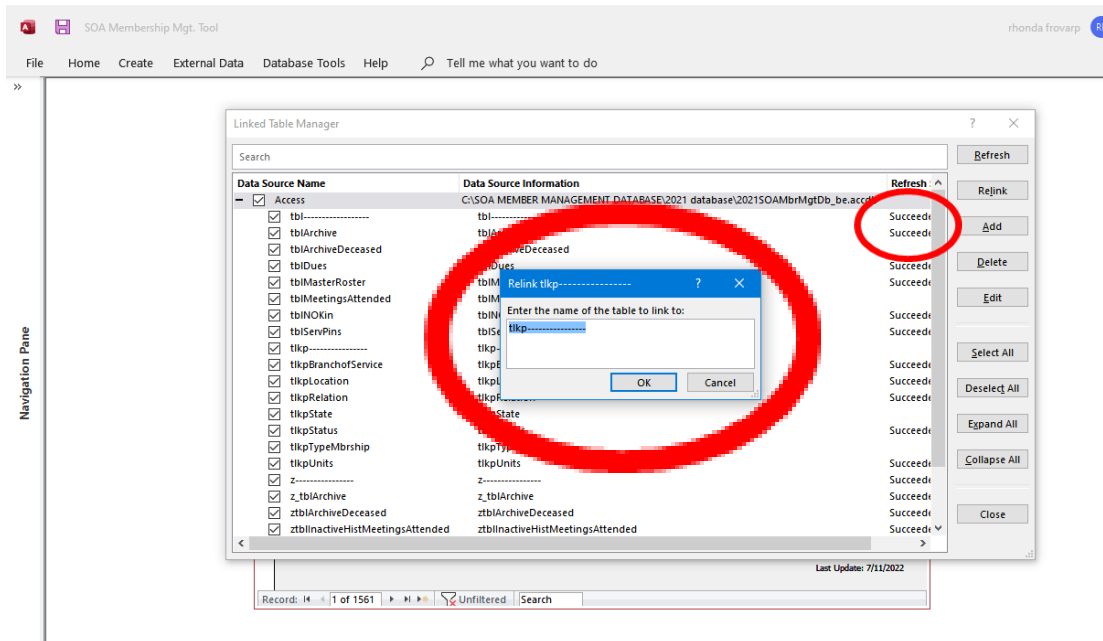
- iv. Click (right side), the Relink button



- e. This will automatically open the file cabinet
- f. from C drive, find the directory of your database
 - i. Doubleclick on the icon for the backend.



- g. The next dialogue box will prompt which tables to relink. Click ok in each box until all have been successfully relinked.



- h. A different dialogue box may appear that will state the tables will automatically be relinked unless there will be changes to table names. Choose no to changing table names and close.

XVI THE INTERFACE

A. SAVING TECHNIQUES – SAVE YOUR WORK OFTEN

1. The system autosaves your work; however, save your work often
 - a. When moving records from the active roster to Inactive or Deceased, go to that archive to ensure the record was moved from the Active roster.
2. PENCILS AND ARROWS
 - a. If the arrow in the red circle below is in focus, the record has been saved
 - b. if a pencil is in focus instead of an arrow, the record is in draft mode.
3. Be sure to save your work often

B. AAPLACEHOLDER

1. This record has been added to help reduce the risk of input errors. It is advised that after each member record is updated, the database is returned to AA Placeholder
 - a. Use the SOA#9999 or AA to return to the page.
2. This record also contains SOAR reunion history.

The screenshot displays the 'SOA Membership' window with the following details:

- Form Fields:**
 - Last Name: AA, First: Placeholder
 - Address: 123 Elm Street
 - City: Anywhere
 - State: CA, HomePhone: 123-456-7890
 - Country: , Cell Phone: 123-456-7890
 - ZipCode: xxxxx-xxxx
 - Email: ME@anywhere.com
 - SOA Nbr: 9999, Dues Year: 2019
 - Date Joined: 1/1/1977, Date Updated: 12/4/2018
 - Type Membership: General, Paid: \$30.00
 - Sponsor Name: Sherman bk pg ?, How Paid: online
 - Qualifying Unit: 15SOS, Status: Annual
 - Qual Location: VietNam, Date Deceased: (YYYYMMDD)
 - Service: US Army, SOA Riders:
 - Rank/Title: ie rank/title/distinct, Do Not List:
 - Reason Date Updated: DO NOT DELETE THIS RECORD. AA Placeholder record is to show field input standards and is a template to research records.
- SOAR Attendance Table:**

SOAR	Attend	Year	Atte	Comments
42	<input type="checkbox"/>	2018		Oct 15-20; Orleans Casino, Pres. Rick Estes, Spe
41	<input type="checkbox"/>	2017		Oct 16-20; Orleans Casino, Pres. Rick Estes, Spe
40	<input type="checkbox"/>	2016		Oct 17-21; Orleans Casino, Pres. Rick Estes, Spe
39	<input type="checkbox"/>	2015		Oct 19-23; Orleans Casino; Pres. Rick Estes; Spe
- Navigation Buttons:** Units, Service, Location, NOK List, Inactive, Deceased, View All, NOK, AppNew, Pin History.
- Status:** Record: 1 of 42, Unfiltered.

C. DEFINITION OF THE DIFFERENT SECTIONS OF THE INTERFACE:

1. Navigation Pane: Click F11 to open. This will expose All Access Objects - tables, queries and forms.
 - a. Should the interface disappear. Open the navigation pane and click on frmMemberMgt box
2. Date boxes - Some date formats are different than others. Mouse over to view the format. The format for date deceased is different from the updated date format.
 - a. Note the updated box has a calander box beside it. Open the calander box to click on the date desired.
3. Definition of the Buttons across the bottom of the interface:
 - a. Units, Service, Location – As new designations are approved, they can be added here by clicking the requested button and then the *add new button* at the bottom the form.
 - b. Inactive – Opens the inactive file table
 - c. Deceased – Opens the deceased table
 - d. View All – Open the file showing all members from all tables
 - e. NOK – Opens the NOK file in conjunction with the member record for editing.
 - f. AppNew – When adding several new members at one time.

- g. Pin History – Opens the service pin history showing pins and tenure for each member.

XVII NEW MEMBER RECORDS

A. ADDING NEW MEMBERS

1. Identify the next available member number
 - a. from the drop down box labeled Find Mbr Nbe, scroll to the last member number assigned.
2. Add new record:
 - a. On the tool bar (top ribbon click “New”. This brings up a new blank record, or; At the bottom of the screen, click on “Add a New blank Record”
 - a new blank record will appear.
 - Add information into each cell.
 - Fill in the information from the new member application form.
 - Names will resort in alpha order.
 - Click on the NOK button to open the NOK record and add NOK and or emergency contact to record.
 - b. Designations for Rank/Title, SOA Riders, Do not list
 - Rank/Title – Add if member is an author, MG, etc.
 - SOA Riders – click if a member
 - Do not list – excepting the AAR/PRP some members do not want their name shared

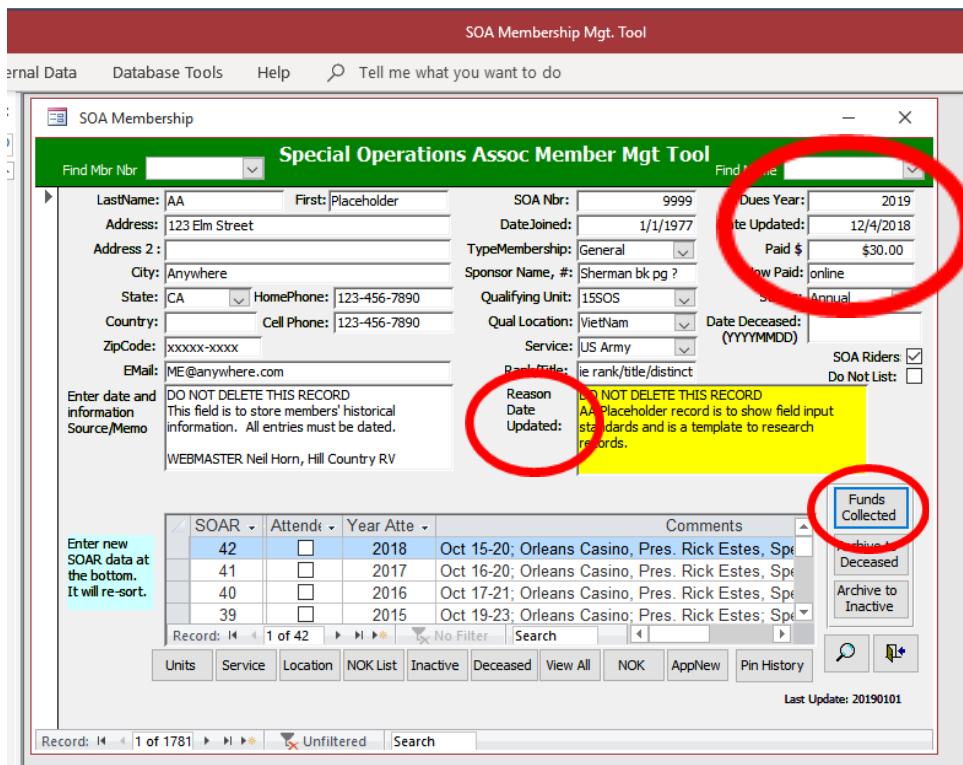
XVIII CHANGING/UPDATING AN EXISTING MEMBER’S RECORD

A. FIND AND OPEN THE MEMBER RECORD:

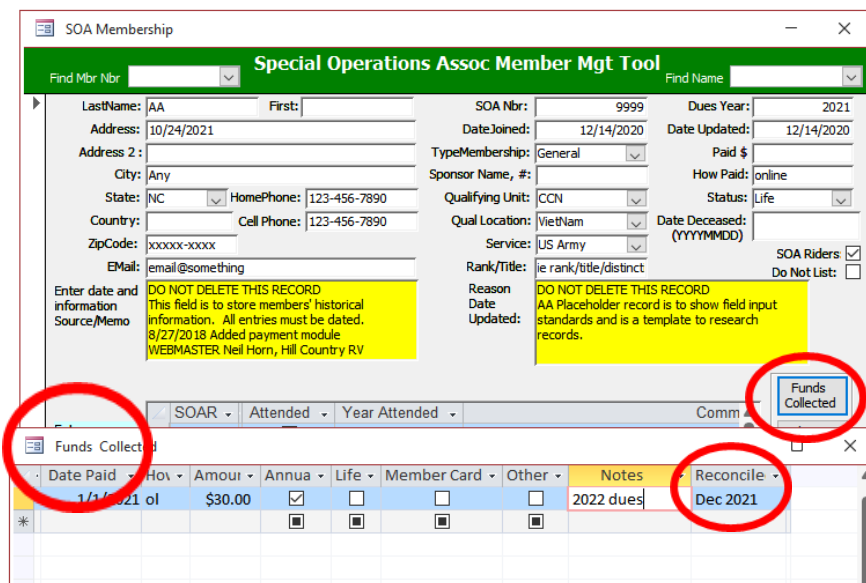
1. Find the member record entering their last name or SOA number in the appropriate field.
 - a. Click on the member’s name in the drop down.
 - b. Make necessary changes. Refresh and save often.

B. ENTER DUES PAYMENTS/DUES YEARS

1. Open the member’s record
 - a. In the sections circled in red below:
 - b. Enter the new dues year; amount paid and how paid
 - c. IMPORTANT: always enter the date updated.
 - d. Enter information as needed in the Reason Updated field.



2. Click on the Funds Collected button
 - a. Enter dues information.
 - b. Reconcile with Treasurer report monthly.
 - c. Enter the month and year the record was reconciled with the Treasurer's report.



C. ARCHIVING DECEASED AND INACTIVE MEMBERS

1. General, Associate, Operational Associate and Honorary are archived to the deceased roster.

- a. Open the member record.
 - b. Click box *ArchDeceased* or *ArchInactive*.
 - c. Dialog box will appear: Do you want to archive and delete this member? Click yes
 - i. A second box will verify the move was successful.
 - d. Member record will be moved to appropriate table.
 - e. The system will default back to placeholder record.
 - i. if a dialogue box opens and the database seems “stuck”, exit out of the program and reopen it.
 - f. A good practice is – each time you archive a deceased or inactive member, open the archived folder to ensure the record was successfully moved.
2. Each March, inactive members who have not paid dues in more than 24 months are archived to the inactive roster.
Members who are not current by March 1 of each year, their status is changed to inactive, but not archived to inactive.
 3. Deceased records are archived as soon they are identified.
 4. Always save and/or refresh often.

D. ARCHIVING WARRIOR WIDOW RECORDS

1. Widows are NOT archived to the deceased roster.
 - a. Widows use their husband’s SOA number
 - i. There cannot be two records with the same number in the database.
 - ii. widow’s records are deleted from the database on their death.

E MOVING MEMBER RECORDS FROM ACTIVE TO DECEASED STATUS

1. Open the member record. (Locate by member name or SOA#
2. Click in name box to unlock.
3. Tab over to update box, change date to current date.
4. Tab over to Status Box and change status to Deceased.
5. Enter the date of death. Notice the format for the date of death
YYYYMMDD
6. Click Archive to Deceased, a dialogue box will open to confirm, click yes, then save.
 - a. It is a good idea to click back on the Active button after the deceased member is archived. This will ensure the record was successfully archived.
 - b. If a dialogue box appears when returned to the Active Roster, that says, Object is locked, click on the deceased (or inactive button and then back to the Active Roster.
7. Once in the deceased file, the record cannot automatically be returned to the active roster. Must delete the deceased record and create a new one.

F. MOVING A MEMBER FROM ACTIVE TO INACTIVE STATUS

1. Open the member record. (Locate by member name or SOA#
2. Click in name box to unlock.
- 3 Tab over to update box, change date to current date.
4. Tab over to Status Box and change status to Inactive.
5. Click Archive to Inactive, confirm move and save.

G. MOVING A MEMBER FROM INACTIVE BACK TO ACTIVE STATUS.

1. Open the Interface for Inactive Records at the bottom of the interface page.
 - a. to move to Active, *Click to Master.*
 - b. to move to Deceased, click *To Deceased.*
2. To return to the active interface, click the box *Active*, bottom left.

XIX ANNUAL ATTENDANCE QUERY

A. APPEND SOAR MEMBER ATTENDANCE TO THE MASTERROSTER.

1. Registrar will provide a spreadsheet for the annual soar attendees.
 - a. Once the spreadsheet is received, place it in the directory.
 - b. Create a linked table in database and name it xlSOAR45 (or the current SOAR year.
 - c. Right click the query named *qapp2021soar attendees* and change the year to the current year. (the year appears more than 1 time)
 - d. Click and run the qapp query
 - i. NOTE a dialogue box will appear
 - Type in the current SOAR # (i.e., 45, 46, etc.)
 - Type in -1 for the y/n attend question
 - e. Click the refresh button, then, click on a member record to ensure the query worked.
 - f. Take care, if changes do not appear, close the db and then reopen. Do not perform this function a second time. It will produce the same action and you will have duplicate data.

B. CAUTION: THE QAPP QUERY DOES NOT ENTER INFORMATION INTO AA PLACEHOLDER.

1. You must enter the information into AA Placeholder manually.

XX REGISTRATION DATABASE SEQUEL LANGUAGE

A. The following is provided in the event the current sequel language in the Registration DB becomes corrupt.

1. This is the sequel language to create the query from the registration database to create the spreadsheet to append the reunion attendees to the membership management database.
 - a. Note: Must change the year and SOA# each year, however, do not make any other changes. Cut and paste exactly as is.
 - b. This is only necessary when the existing language in the DB does not work, otherwise change the date and SOA#

```
SELECT MemberCheckIn.MemberID, MASTERROSTER.[SOA #] AS intSOAMbrNbr, 45 AS SoarNbr, MemberCheckIn.checkin AS Attended, 2021 AS YearAttend
```

```
FROM (MASTERROSTER INNER JOIN MemberCheckIn ON MASTERROSTER.MemberID = MemberCheckIn.MemberID INNER JOIN MemberFees ON MASTERROSTER.MemberID = MemberFees.MemberID
```

```
WHERE (((MemberCheckIn.checkin =True AND ((MemberFees.Reunion =1
```

```
ORDER BY MASTERROSTER.[SOA #];
```

XXI SEQUAL LANGUAGE FOR NEW MEMBER REPORT

- A. The optimum way to enter new member records is manually to reduce the risk of errors and loss of information.**
- B. THE LANGUAGE IS BEING PROVIDED IN THE EVENT IT BECOMES CORRUPTED.**
 1. To input multiple new members at once, Create an excel spreadsheet
 - a. Name the ss *xlNewMemberReport* and place it in the directory where the mmdb is located.
 - b. The headings in this ss are the same as those in the masterroster. You may add additional heading. For instance, if a new member is also adding NOK information.
 - c. To append the information to the database:
 1. Create a linked table to the tables collection of the mmdb named *xlNewMemberReport*. Note the number of records that will be appended. 1 records for the New member + 1 for the wife = 2 records to be appended, etc.
 2. Click the app new button.
 3. Update Dialog box opens, click update.
 4. Link Update box opens enter name of ss: *xlNewMemberReport*.
 5. Confirm update box opens and asks (do you want to update. , click yes.
 6. If a box opens saying failure to create file, click OK and disregard.

7. Information will append, and a dialogue will display the number of records appended.

```
INSERT INTO tblMasterRoster (datDATEJOINED, intSOAMbrNbr, intTYPE, intSTATUS, txtYR,
txtLASTNAME, txtFIRSTNAME, txtADDRESS, txtADDRESS2, txtCITY, txtST, txtCOUNTRY,
txtZIPCODE, txtHOMEPHONE, txtCELLULAR, txtFAX, txtEMAIL, memREFERENCEDATE, intUNIT,
intLOCATION, intSERVICE, txtUdateReason
SELECT xlNewMemberReport.datDATEJOINED AS Expr1, xlNewMemberReport.txtSOAMbrNbr
AS Expr2, xlNewMemberReport.intTYPE AS Expr3, xlNewMemberReport.intSTATUS AS Expr4,
xlNewMemberReport.txtYR AS Expr5, xlNewMemberReport.txtLASTNAME AS Expr6,
xlNewMemberReport.txtFIRSTNAME AS Expr7, xlNewMemberReport.txtADDRESS AS Expr8,
xlNewMemberReport.txtADDRESS2 AS Expr9, xlNewMemberReport.txtCITY AS Expr10,
xlNewMemberReport.txtST AS Expr11, xlNewMemberReport.txtCOUNTRY AS Expr12,
xlNewMemberReport.txtZIPCODE AS Expr13, xlNewMemberReport.txtHOMEPHONE AS
Expr14, xlNewMemberReport.txtCELLULAR AS Expr15, xlNewMemberReport.txtFAX AS Expr16,
xlNewMemberReport.txtEMAIL AS Expr17, xlNewMemberReport.txtSPONSOR AS Expr18,
xlNewMemberReport.intUNIT AS Expr19, xlNewMemberReport.intLOCATION AS Expr20,
xlNewMemberReport.intSERVICE AS Expr21, xlNewMemberReport.txtUPDATEREASON AS
Expr22
FROM xlNewMemberReport.
```

XXII FUTURE USES OF THE DATABASE

The registration database is a members' driven database designed to collect, retain, and track member activities. The information collected is sensitive and care should be taken to ensure it is not compromised.

1. Explore an online, secure, searchable database for members to search for other members. Limited information, such as name and email address (or maybe phone , could be made available so that the searching member could send an email. Members could sign up for this on the website giving permission for their information to be made available to other SOA members.

Special Operations Assoc. Member Mgt Tool
Primer; Link frontend to backend.

Developed 02/24/2011

APPENDICES:

APPENDIX 1. TIMELINE:

- A. January through December- the following duties are performed daily.
 - 1. Review membership forms and revise, as necessary.
 - 2. Receive, and vet new member requests
 - 2. Receive, log and deposit member fees
 - 3. Update contact information in database as necessary
 - 4. Write queries or retrieve information from database for reports, etc.
 - 5. Research units for inclusion into the approved unit list.

- B. January through March – Prepare information for inclusion in the AAR
 - 1. Identify annual members who have not paid dues. Change status if necessary
 - 2. Send an updated list of active members Names, SOA# and email address to the webmaster.
 - 3. Compile mail list for AAR
 - 4. Prepare report for the AAR
 - 5. Review and revise insert form for AAR/PRP – Renewal announcement, change of address forms, Next of Kin forms, or other information for inclusion into SOA publications, PRP/AAR/website/newsletters.

- C. April – July
 - 1. Prepare PRP mail list
 - 2. Prepare Membership report

- D. August - October
 - 1. Interface with registration committee
 - 2. Man registration station at the reunion to answer member questions, take renewals, etc.

- E. Nov – Dec
 - 1. Post member renewals

APPENDIX 2 – MEMBERSHIP CRITERIA AND APPLICATION



SPECIAL OPERATIONS ASSOCIATION Membership Criteria www.specialoperations.org



Membership in the Special Operations Association is open to Veterans or members of a U.S. Armed Forces Special Operations Unit who has conducted Special Operations as an operational combat element or provided direct support to the operational combat element within an assigned area of operations. Visit the SOA website for detailed information.

DOCUMENTATION REQUIREMENTS – Documentation is required verifying your **assignment** to a Special Operations Unit, the **dates** you served in that Unit, the **location** where you served, your **MOS** and your **operational role** in that combat element. You must provide enough documentation for the Membership Committee to understand your qualifications.

MEMBER CLASSES - The SOA Bylaws define two classes of members, **General** and **Associate**. **Operational Associate** is a *distinction* conferred on non-US Armed Forces members that support the General class.

GENERAL

- A Veteran or member of a U.S. Armed Forces Special Operations Unit as defined by this Association
- Has conducted Special Operations as an operational combat element or provided direct support to the operational combat element in an operational role within an assigned Area of Operations.
- Routine or normal duty while on this assignment must have placed the applicant in direct threat/exposure to hostile fire
- Documentation includes, but is not limited to DD214/215, Awards, CIB, citations, and Orders.

ASSOCIATE

- A Veteran or member of a U.S. Armed Forces Special Operations Unit as defined by this Association
- Supported the conduct of his unit's Special Operations in a non-operational direct support role.
- Normal duty did not involve direct threat or exposure to hostile fire.
- Documentation includes, but is not limited to DD214/215, Awards, CIB, citations, and Orders.

OPERATIONAL ASSOCIATE

- Members of foreign military units and paramilitary personnel who served with U.S. Armed Forces Special Operations Units, in the role defined in the General Member category.
- Sponsorship by a General member of the SOA and an abbreviated biography of the candidate.

SPECIAL OPERATIONS UNITS AS DEFINED BY THIS ASSOCIATION – Visit the SOA website, www.specialoperations.org to review the current list of approved units.

- The unit/project/operational team must be or have been composed of U.S. Armed Forces military personnel with a mission to conduct Special Operations while assigned to what this Association defines as a Unit specifically designated and tasked with conducting combat and other combat-related missions of an unconventional, covert and/or clandestine nature; or,
- On a routine basis provided direct combat support as part of the Operational Team performing Special Operations missions, aviation units providing insertion, extraction, and direct fire support while in close proximity to enemy forces.

Applications are available online (preferred) on the SOA website or mail to: Membership Committee, PO Box 335461, N. Las Vegas, NV 89033. A \$35 non-refundable application fee is required. Make checks payable to the SOA.

APPENDIX 3 MEMBERSHIP APPLICATION



SPECIAL OPERATIONS ASSOCIATION Application for Membership www.specialoperations.org



The SOA By-Laws define two classes of SOA Members: **General** and **Associate**. **Operational Associate** is a *distinction* conferred on non-US Armed Forces members that support the General Member category.

Indicate the Membership type you are applying for:

GENERAL
 ASSOCIATE
 OPERATIONAL ASSOCIATE

If you do not qualify for General, will you accept Associate or Operational Associate? YES _____ NO _____

A. CONTACT INFORMATION				
LAST NAME:	FIRST NAME:	MIDDLE NAME:		
STREET ADDRESS	CITY	STATE	ZIP+4	
PHONE	CELL PHONE	EMAIL		
DATE OF BIRTH	SSN	SERVICE NUMBER		
B. EMERGENCY CONTACT OR NEXT OF KIN (NOK :				
FIRST/LAST NAME, ADDRESS	RELATIONSHIP	PHONE	EMAIL	
C. DOCUMENTATION is required verifying your assignment to a Special Operations Unit, the dates you served in that Unit, location where you served, your MOS and your operational role in that combat element.				
D. QUALIFYING UNIT(S) : Enter your Special Operations Unit assignment(s) below. The approved units list is posted at www.specialoperations.org . If your unit is not on the list, and you can document that you served in a Special Operations Unit as defined by the SOA, contact the Membership Committee for further instructions before submitting the application.				
BRANCH	QUALIFYING UNIT(S)	MOS AND DUTIES WHILE DEPLOYED	DATES OF DEPLOYMENT	LOCATION
E. SPONSORSHIP: If you have a SOA member in good standing, who served with you and can verify your eligibility, print their name, and contact information below. A member of the Committee will contact them. SOA Member Name: _____ Contact info.: _____				
F. How did you hear about the SOA? Why do you want to become a member?				

G. Why do you want to become a Member of the SOA?

H. APPLICANTS OATH: I affirm that the information submitted is true, correct, and voluntarily given. I grant permission to the Membership Committee to review my application and documentation for membership in the Special Operations Association.

Applicant's signature: _____

Date: _____

rev Dec. 2019

APPENDIX 4 CONTACT AND NOK FORM

CONTACT INFORMATION CHANGE/NOK FORM

Keeping your contact information up to date ensures that you will receive your AAR/PRP publications and other news of interest to the SOA membership in a timely manner. Indicate below changes you would like to make on your record. All information is confidential and will not be shared without the Member's prior consent.

MEMBER PERSONAL CONTACT INFORMATION

SOA# _____ Date of change _____

First Name _____ MI _____ Last Name _____

Address _____

City _____ State _____ Zip + 4 _____

Home phone _____ Cell Phone _____

Email _____

EMERGENCY CONTACT

Indicate additions or changes to your emergency contact information:

Relationship to Member (wife, Son, Daughter, Brother, etc.) _____

First Name _____ MI _____ Last Name _____

Home phone _____ Cell Phone _____

Email: _____

This form may be completed online at www.specialoperations.org, or mailed to the below address:

Membership Chairman
PO Box 335461
N. Las Vegas NV 89033
membership@specialoperations.org

APPENDIX 5 - INVENTORIES

A. MEMBERSHIP CARDS

YEAR	TYPE	NEW MBR	REPLACEMENT	STATUS CHG	TOTAL ANNUAL	TOTAL LIFE
2018	Annual	40	30	0	70	
	life	3	13	38		54
2019	Annual	49	24	0	73	
	life	6	12	24		42
2020	Annual	44	17	0	61	
	life	3	11	30		44
2021	Annual	47	20	0	67	
	life	13	10	25		48
NUMBER DISTRIBUTED -		205	137	117	271	188
				Trash	11	5
Number Distributed					282	193
Beginning inventory 4/25/2018					-442	-322
On Hand 11/30/2021					160	129
# years current inventory will last based on usage					2+ years	2+ years

NOTES: AVERAGE USAGE IS - 70 annual cards and 50 LIFE cards per year.

DO NOT AUTOMATICALLY REORDER ANNUAL CARDS. THEY HAVE INCORRECT INFORMATION ON THEM.

B. TENURE PINS

PIN INVENTORY*

	5	10	15	20	25	30	35	40	45	on hand
ON HAND 1/1/2022										
TOTAL										

*inventory in process

APPENDIX 6 – IRS PERCENTAGE FOR 501 C 19 STATUS

A. CALCULATE THE IRS PERCENTAGE:

1. The percentage is calculated on the number of present and past members of a branch of the US military versus those who are not.
2. Open the database query DB 2021 IRS calculation.
3. The query filters each record by Branch of Service –
 - a. Military branches are US Army, USMC, USAF, NAVY, USMC; widows are added to this group, so include WIDOW in this number.
 - b. Non-military codes - RVN; CIV; Republic of Vietnam, CIV, etc..
 - c. NOTE – Honorary are not members and are not part of the query.
4. Filter the number of records based on the code.
5. Calculate the percentage or give raw numbers to the Secretary.

B. The following was taken from the 501 (c) 19, IRS page:

A veterans’ post or organization must meet the following requirements to be exempt under section 501(c)19 :

1. *It must be organized in the United States or any of its possessions*
 2. *At least 75 percent of its members must be past or present members of the United States Armed Forces*
 3. *At least 97.5 percent of its members must be:*
 - o *present or former members of the United States Armed Forces,*
 - o *cadets (including only students in college or university ROTC programs or at Armed Services academies or*
 - o *spouses, widows, widowers, ancestors, or lineal descendants of individuals referred to in the first or second bullet*
 4. *2.5% - no more than 2.5% can be non-us military.*
-

APPENDIX 7 – MEMBERSHIP RENEWAL ANNOUNCEMENTS

**DUES ARE DUE NLT JAN EVERY YEAR. FAILURE TO PAY MAY RESULT IN YOUR MEMBERSHIP BEING INACTIVE. PAY ASAP.
IF YOU ARE UNSURE OF YOUR MEMBERSHIP STATUS CONTACT THE MEMBERSHIP CHAIRMAN.**

APPENDIX 8 – MEMBERSHIP HISTORICAL STATS

A. HISTORY OF THE STATE OF THE MEMBERSHIP 2000- 2021

		YEARS			
		2000	2011*	12/31/2019	11/22/2021
ACTIV E ROST	TYPE & STATUS				
	1 GENERAL	1123	1518	1291	1213
	2 ASSOCIATE	133	153	123	121

	3 OPERATIONAL ASSOCIATE	0	108	22	19
	4 HONORARY	33	47	46	51
	5 WARRIORS WIDOW	47	47	46	27
	ACTIVE	1336	1873	1528	1431
ARCHIVED	3 INACTIVE (All Mbr. types)	366	817	1106	966
	4 DECEASED/OTHER (All Mbr. types)	121	326	837	1157
	ARCHIVED	487	1143	1943	2123
	ALL RECORDS	1823	3016	3471	3554

NOTES: DATA collected November 22 2021

Operational Associate – BOD added membership category BOD in 2010

B. NEW AND DECEASED MEMBER HISTORY 2014 - 2021

YEAR	# DEC'D	NEW MEMBERS					TOTAL NEW MBR.
		Gen	Assoc	Op. Assoc.	Honorary	W. Widow	
2014	267	38	2	0	1	3	44
2015	37	25	3	0	1	1	30
2016	37	24	3	1	3	4	35
2017	46	41	5	0	2	1	49
2018	59	32	8	0	2	2	44
2019	90	37	9	0	3	2	51
2020	92	34	12	0	0	1	47
2021	214	32	10	0	9	3	54
TOTALS	842	263	52	1	21	17	300

NOTE: 2021 TOTALS THROUGH 11/24/2021

C. SOAR REUNION ATTENDANCE HISTORY

	2016	2017	2018	2019	2021
GENERAL	304	290	262	268	217
ASSOCIATE	20	24	20	20	14
OP ASSOC	6	1	1	0	1
HONORARY	5	12	10	9	12
WIDOW	7	5	8	8	10
TOTAL MBR	342	332	301	305	254
ALL GUESTS	374	297	358	259	339
TOTAL ATTENDANCE					593
MBR/GUEST CANCELS/NO SHOWS	31	25	49	29	74
TOTAL REGISTRATIONS PROCESSED	747	654	708	593	667

All GUESTS - includes guests of members, Invited guests of the BOD, and Non-member vendors and their staff.

2018 and 2021 Guests totals include Memorial Breakfast attendees