

RIMS

Membership Director Handbook



Congratulations on accepting the position of Membership Director for your local chapter. This is an important role, as you are representing RIMS and your local chapter to both current members and prospective members. The keys to being successful are to become familiar with the membership categories and benefits, as well as to understand how to search the RIMS Web site for all your current membership reports.

This handbook is a how-to guide, complete with screen shots from the RIMS Web site, developed to assist you in serving your chapter and its members effectively.

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Membership Categories

To fulfill your role as your Chapter's Membership Director it is important to understand the various categories of RIMS membership and the eligibility requirements for each. The following are the categories summarized for you. You may read the formal Constitution and Bylaws and descriptions of each category at <http://www.RIMS.org/bylaws>

Corporate/Organizational Member

Membership is available to any corporation, organization or legal entity. These individual representatives, known as "Deputy members," are salaried employees of the organization requesting membership and solely provide the internal risk management function for the benefit of the member (the Corporation). The corporation, not the individual, holds this membership. This category allows for two representatives per company. If a Deputy leaves the member company, the membership remains with the company.

Additional representatives can be added for an additional fee.

Associate of the Society

An Associate is an individual who can confirm their commitment to uphold and further the risk management discipline, and who is NOT eligible for Deputy membership. This membership is available to the vendor or service provider – i.e., broker, lawyer, consultant, account executive, outsourced risk manager, etc. An individual who works with clients of their employer is eligible to join as an Associate of the Society.

Educational Member

An individual who is a faculty member teaching risk management, insurance or benefits courses or chairing a department that offers risk management, insurance or benefits courses. Education is the individual's primary focus.

Affiliate Member

An individual who was a current Deputy member upon separation from his/her current place of employment. It is renewable once, for a maximum of 2 years from the date of separation. Upon acceptance of new employment this membership is cancelled.

Student Member

This category is for any full-time student, as defined by that college or university. The student's major must be in risk management, insurance or business, finance or management with an emphasis in risk management and/or insurance provided such individual is not otherwise eligible for membership in another class.

Retired Member

For the Deputy member, Educational member or Associate of the Society who was previously employed in risk management or one of its related specialties prior to retirement. Member must be fully retired.

Honorary Member

Membership is conferred only by the Board of Directors of RIMS. Criteria for an individual includes serving as an officer or director of RIMS and making outstanding contributions to the advancement of RIMS. Individual must be a current member at time of nomination.

Chapter-Only Members

RIMS does not recognize chapter-only members as members of RIMS. These individuals are only receiving information from your local chapter and are not paying Society dues. Note that having chapter-only members who are eligible for Corporate membership is prohibited by RIMS Constitution and Bylaws.

2007 Society Dues Structure

Corporate Membership

Dues are \$465 U.S. per year, plus any applicable local chapter dues. This fee entitles the company to designate 2 individual representatives (Deputy members) on the membership who are involved with the company's internal risk management function. Additional Deputy members may be added for \$150 U.S. per year, plus any applicable local chapter dues.

Associate of the Society Membership

Dues are \$485 U.S. per year plus any applicable local chapter dues per individual.

Educational Membership

Dues are \$100 U.S. per year, plus any applicable local chapter dues per individual.

Affiliate Membership

Dues are \$75 U.S. per year, plus any applicable local chapter dues per individual.

Student Membership

Dues are \$50 U.S. per year, plus any applicable local chapter dues per individual.

Retired Members

Dues are \$100 U.S. per year, plus any applicable local chapter dues per individual.

Honorary Members

There are no dues collected from Honorary member.

Chapter Dues

Each RIMS chapter decides the amount of dues they will charge their members. Some chapters collect for a year's worth of meetings up front as part of their yearly dues, while others charge an annual fee, and each meeting attended is an additional cost. Please remember, when selecting the amount of your yearly dues, be sure that you provide value for what you are charging. RIMS suggests you charge your dues on a per individual basis, instead of per company. Take a look at the member companies in your chapter. If most have 2 or more deputy members per company, you may be able to increase your chapter's revenue by charging per individual. Charging per individual is also helpful if a company holds a membership in another state/chapter, but one of their deputy members is located in your area. If you do not charge per individual, your chapter would receive no dues for this member.

Chapter Rosters

You are encouraged to download your chapter membership roster on a monthly basis.

Your current roster will help you to easily keep track of your members, promote upcoming meetings, and to welcome all new members to your chapter. As Membership Director for your chapter it is important to contact your new members and make them feel welcome at meetings and other chapter events. Keep in mind that these individuals and companies have paid your chapter money to receive a service.

The old cliché is true, you can only make one first impression with your new members, and a bad first impression is hard to repair. New members are potential new volunteers. A welcome call, email or letter is a great way to get someone involved in helping your chapter to succeed. Typically, members who do not renew their membership are inactive members who have not attended local chapter meetings or been involved in RIMS Society events. Remember, it's easier to keep an existing member than it is to recruit a new one!

RIMS has made it even easier for you to keep track of your new and current members by making your membership lists available to you 24 hours a day on the RIMS Web site. With a few simple clicks of the mouse you can download your chapter's current members, your new members for any given date range, view your cancelled or dropped members to aid in your recruitment and retention efforts, and download this information into an easy to use Excel spreadsheet.

Membership Reports

RIMS has developed a series of simple management tools, which will enable chapter leaders to more effectively manage their members. These new management reports allow chapter officers to query the RIMS database for up-to-date information on chapter membership. It is important to remember that members can login at any time to update their record and as a result, chapters who keep their own database of information may not have the most up-to-date records. Using the following reports, chapter leaders can download information contained in the RIMS database into a simple to use Excel format. Alternatively, you can use these tools to send your chapter members a message such as a meeting notice or chapter update.

New Member Report

Run the report that will list all new members who joined your chapter in the last 30, 60 or 90 days. If you were waiting for approval on a specific applicant from RIMS, this is how you will find out if the prospective member's application was accepted.

Expired Member Report

You can run a report that will list those members whose membership lapsed in the last 30, 60 or 90 days.

Expiring Member Report

To be proactive, run a report that will list all members who are due to expire in the next 30, 60 or 90 days and use that advance notice to contact them with a renewal and benefits reminder.

All Members and Non-Members Report

You can run a list that includes every individual that is associated with your chapter, whether they are a member or a non-member. This should help you with your membership marketing effort. The All Members' function allows you to download a roster of current, active chapter members.

The following pages contain the simple instructions on how to download your chapter's membership information.

New Member Report

Chapter officers will run this report to identify all members who have recently joined RIMS and are members of your chapter. This report is based on the “Join Date” which is the date the new member’s membership application was approved by the Society.

- Go to WWW.RIMS.ORG
- Log on. (Your login is your e-mail address, and your password is your last name, unless you have changed your password.)

GO TO:

- **Chapters**
- **Chapter Officer Tools and Resources**
- **Membership Management**
- **Membership Reports**

➤ The first report is for **New Members**. You will need this report to identify your new members to aid in effectively welcoming them.

➤ You will have the option to send e-mails or download into an Excel file.

➤ **Step 1: Restrict my search selection to:** (choose one):

- those who do not have an e-mail address.
- those who have an e-mail address.
- everyone, regardless of whether they have an e-mail address.

➤ **Step 2: Select joined date criteria:** You can choose more than one option. For example, if you want to see everyone who had joined in the past 0 to 60 days, you would need to choose the first two options.

- All members who joined in the past 0 to 30 days.
- All members who joined in the past 31 to 60 days.
- All members who joined in the past 61 to 90 days.

➤ **Step 3: Sort the results in the following order:** (choose one):

- Last Name
- Member Type
- Company Name

➤ Click Search button.

➤ You will have the following options (choose one):

- Send e-mail to this group using RIMS E-Mail Manager (attachments allowed)
- Send HTML & plain text e-mail to this group using RIMS E-Mail Manager
- Create a distribution group and save in My RIMSMAIL
- Download information into a (.csv) file
- Demographic information

➤ *If you select:* Send e-mail to this group using RIMS Email Manager. You will be able to send a blast e-mail to all the members who meet the criteria you have chosen and upload an attachment.

➤ *If you select:* Send HTML & plain text email to this group using RIMS Email Manager. You will be able to send a blast e-mail to all the members who meet the criteria you have chosen in html or plain text.

➤ *If you select:* Create a distribution group and save in My RIMSMAIL. You will be able to save this group as a distribution list.

➤ *If you select:* Download information into a (.csv) file. You can save this information to your hard drive as an Excel file for mail merges, distribution lists, etc.

➤ *If you select:* Demographic Information. You will be able to view demographic information by Sizes, Industry Groups, Job Functions, RM Functions, and RM Expenditures.

Your results will be displayed similar to the sample on page 16.

New Member Report

Membership, Marketing and Retention, Simple Reports

(ALL Chapters - You are logged in as Staff)

Use the following report to send e-mails or download an excel file based on your selected criteria.

STEP 1 -- Restrict my search selection to:

- ...those who do not have an e-mail address.
- ...those who have an e-mail address.
- ...everyone, regardless of whether they have an e-mail address.

STEP 2 -- Select joined date criteria:

- All members who joined in the past 0 to 30 days
- All members who joined in the past 31 to 60 days
- All members who joined in the past 61 to 90 days

STEP 3 -- Sort the results in the following order:

- Last Name
- Member Type
- Company Name

Search

Reset

EXPIRED MEMBER REPORT

This report will produce a list of all members whose membership expired in the past 30, 60 or 90 days. The report is based on the “Expired Date” which is the anniversary of when they joined. Members who have not renewed 90 days after their expiration date will be reverted to non-member status.

- Go to WWW.RIMS.ORG
- Log on. (Your login is your e-mail address, and your password is your last name, unless you have changed your password.)

GO TO:

- [Chapters](#)
- [Chapter Officer Tools and Resources](#)
- [Membership Management](#)
- [Membership Reports](#)

The second report is Expired Members. This report lists those who are no longer members of RIMS or your chapter. It is suggested that you call these individuals to let them know that their membership has expired, and encourage them to renew to maintain their benefits. RIMS makes every effort to maintain members through Phone Calls, and E-Mails, however sometimes a phone call or letter from a peer is better received. Anyone whose name appears on this list should be removed from any member communications the chapter distributes. Since they are no longer members they should not be receiving any benefits.

- **Step 1: Restrict my search selection to:** (choose one):
 - those who do not have an e-mail address.
 - those who have an e-mail address.
 - everyone, regardless of whether they have an e-mail address.

- **Step 2: Select joined date criteria:** You can choose more than one option. For example, if you want to see everyone who had joined in the past 0 to 60 days, you would need to choose the first two options.
 - All members who joined in the past 0 to 30 days.
 - All members who joined in the past 31 to 60 days.
 - All members who joined in the past 61 to 90 days.

- **Step 3: Sort the results in the following order:** (choose one):
 - Last Name
 - Member Type
 - Company Name

➤ Click Search button.

➤ You will have the following options (choose one):

- Send e-mail to this group using RIMS E-Mail Manager (attachments allowed)
- Send HTML & plain text e-mail to this group using RIMS E-Mail Manager
- Create a distribution group and save in My RIMSMAIL
- Download information into a (.csv) file
- Demographic information

➤ *If you select:* Send e-mail to this group using RIMS Email Manager. You will be able to send a blast e-mail to all the members who meet the criteria you have chosen and upload an attachment.

➤ *If you select:* Send HTML & plain text email to this group using RIMS Email Manager. You will be able to send a blast e-mail to all the members who meet the criteria you have chosen in html or plain text.

➤ *If you select:* Create a distribution group and save in My RIMSMAIL. You will be able to save this group as a distribution list.

➤ *If you select:* Download information into a (.csv) file. You can save this information to your hard drive as an Excel file for mail merges, distribution lists, etc.

➤ *If you select:* Demographic Information. You will be able to view demographic information by Sizes, Industry Groups, Job Functions, RM Functions, and RM Expenditures.

Your results will be displayed similar to the sample on page 16.

Expired Member Report

Membership, Marketing and Retention, Simple Reports

- (ALL Chapters - you are logged in as staff)

Use the following report to send e-mails or download an excel file based on your selected criteria.

STEP 1 -- Restrict my search selection to:

- ...those who do not have an e-mail address.
- ...those who have an e-mail address.
- ...everyone, regardless of whether they have an e-mail address.

STEP 2 -- Select expired date criteria:

- All members of my chapter who have already expired in the last 0 to 30 days.
- All members of my chapter who have already expired in the last 31 to 60 days.
- All members of my chapter who have already expired in the last 61 to 90 days.

STEP 3 -- Sort the results in the following order:

- Last Name
- Member Type
- Company Name

Search

Reset

EXPIRING MEMBER REPORT

The Expiring Members report will produce a list of all members who are due to expire in the next 30, 60 or 90 days. The “Expired Date” is based on the anniversary of the date a member joined. Members will receive 2 invoices prior to their expiration date. Chapter Officers should use this report to identify members who are about to expire to encourage them to renew their membership. Members can renew online by logging into the www.RIMS.org Web site and clicking On **MEMBERSHIP** —> **Dues Renewal**.

- Go to WWW.RIMS.ORG
- Log on. (Your login is your e-mail address, and your password is your last name, unless you have changed your password.)

GO TO:

- **Chapters**
 - **Officers Officer Tools and Resources**
 - **Membership Management**
 - **Membership Reports**
- The third report is **Expiring Members**. Don’t wait until their membership expires to remind your members that their renewal date is approaching. This report will help you to be proactive. Call these individuals to let them know that their membership will soon expire, and encourage them to renew to maintain their benefits. RIMS makes every effort to maintain members through Urgent Faxes, Phone Calls, and E-Mails, however sometimes a phone call or letter from a peer is better received.
- **Step 1: Restrict my search selection to:** (choose one):
 - those who do not have an e-mail address.
 - those who have an e-mail address.
 - everyone, regardless of whether they have an e-mail address.
 - **Step 2: Select joined date criteria:** You can choose more than one option. For example, if you want to see everyone who had joined in the past 0 to 60 days, you would need to choose the first two options.
 - All members who joined in the past 0 to 30 days.
 - All members who joined in the past 31 to 60 days.
 - All members who joined in the past 61 to 90 days.
 - **Step 3: Sort the results in the following order:** (choose one):
 - Last Name
 - Member Type
 - Company Name

- Click Search button.

- You will have the following options (choose one):
 - Send e-mail to this group using RIMS E-Mail Manager (attachments allowed)
 - Send HTML & plain text e-mail to this group using RIMS E-Mail Manager
 - Create a distribution group and save in My RIMSMAIL
 - Download information into a (.csv) file
 - Demographic information

- *If you select:* Send e-mail to this group using RIMS Email Manager. You will be able to send a blast e-mail to all the members who meet the criteria you have chosen and upload an attachment.

- *If you select:* Send HTML & plain text email to this group using RIMS Email Manager. You will be able to send a blast e-mail to all the members who meet the criteria you have chosen in html or plain text.

- *If you select:* Create a distribution group and save in My RIMSMAIL. You will be able to save this group as a distribution list.

- *If you select:* Download information into a (.csv) file. You can save this information to your hard drive as an Excel file for mail merges, distribution lists, etc.

- *If you select:* Demographic Information. You will be able to view demographic information by Sizes, Industry Groups, Job Functions, RM Functions, and RM Expenditures.

Your results will be displayed similar to the sample on page 16.

Expiring Member Report

Membership, Marketing and Retention, Simple Reports

(ALL Chapters - You are logged in as Staff)

Use the following report to send e-mails or download an excel file based on your selected criteria.

STEP 1 -- Restrict my search selection to:

- ...those who do not have an e-mail address.
- ...those who have an e-mail address.
- ...everyone, regardless of whether they have an e-mail address.

STEP 2 -- Select expired date criteria:

- All members of my chapter who will be expiring in the next 0 to 30 days.
- All members of my chapter who will be expiring in the next 31 to 60 days.

STEP 3 -- Sort the results in the following order:

- Last Name
- Member Type
- Company Name

Search

Reset

ALL MEMBERS AND NON-MEMBERS REPORT

If you would like to send a message to your entire chapter, use this report and select Members, Associates, Non-Members and Prospect Members.

➤ Go to: WWW.RIMS.ORG

➤ Log on. (Your login is your e-mail address, and your password is your last name, unless you have changed your password.)

GO TO:

- Chapters
- Chapter Officer Tools and Resources
- Membership Management
- Membership Reports

➤ The last report is for All Members and/or Non-Members.

➤ You will have the option to send e-mails or download an excel file.

➤ **Step 1: Restrict my search selection to:** (choose one):

- those who do not have an e-mail address.
- those who have an e-mail address.
- everyone, regardless of whether they have an e-mail address.

➤ **Step 2: Select any of the following groups of members:**

Note:

By default, if you don't select anything and just click on search, the results will include everyone (members, associates, non-members) who have any sort of relationship with your chapter (includes people who have your chapter selected as the primary chapter as well as anyone else who you have created a chapter relationship for).

* Hold Ctrl key and click to make multiple selections.

** Inactive Members are applicants that have not been fully approved or paid.

RIMS Membership Status*

- Members (excluding Associates)
- Associates
- Non-Members

Include Inactive Members.**

- AND
- OR
- EXCLUDE

([Manage Relationships](#))

Chapter Relationship*

- Associate
- Chapter Affiliate
- Educational

Show individuals with no Chapter Relationship assigned.

Examples:

If you would like to narrow down your search and have fewer, more targeted results, use the following short-cuts as examples of how to change your search criteria:

- Example of "EXCLUDE": [click here](#) to select all members, associates and non-members except anyone with the chapter relationship equal to "Educational" and "Friend of Chapter".
- Example of "AND": [click here](#) to select everyone who has the chapter relationship "Educational" (includes member, non-members etc. but they must have the chapter relationship previously defined).
- Example of "OR": [click here](#) to select all members and associates plus anyone who happens to have the chapter relationship of "Educational" (includes not only members and associates [regardless of chapter affiliation], but also non-members with the chapter relationship "Educational" previously assigned).
- Example of N/A: [click here](#) to select only Members and Associates whose primary chapter is your chapter. This will include members of other chapters where you have defined any chapter relationship

➤ **Step 3: Sort the results in the following order:** (choose one):

- Last Name
- Member Type
- Company Name

➤ Click Search button.

➤ You will have the following options (choose one):

- Send e-mail to this group using RIMS E-Mail Manager (attachments allowed)
- Send HTML & plain text e-mail to this group using RIMS E-Mail Manager
- Create a distribution group and save in My RIMSMAIL
- Download information into a (.csv) file
- Demographic information

➤ *If you select:* Send e-mail to this group using RIMS Email Manager. You will be able to send a blast e-mail to all the members who meet the criteria you have chosen and upload an attachment.

➤ *If you select:* Send HTML & plain text email to this group using RIMS Email Manager. You will be able to send a blast e-mail to all the members who meet the criteria you have chosen in html or plain text.

- *If you select:* Create a distribution group and save in My RIMSMAIL. You will be able to save this group as a distribution list.
- *If you select:* Download information into a (.csv) file. You can save this information to your hard drive as an Excel file for mail merges, distribution lists, etc.
- *If you select:* Demographic Information. You will be able to view demographic information by Sizes, Industry Groups, Job Functions, RM Functions, and RM Expenditures.

Your results will be displayed similar to the sample on page 16.

Search Results/Options

Result Options

- Send e-mail to this group using RIMS E-Mail Manager (attachments allowed)
- Send HTML & plain text e-mail to this group using RIMS E-Mail Manager
- Create a distribution group and save in My RIMSMAIL
- Download information into a .csv file
- Demographics information

Submit

<<Go Back

20 Member(s) Selected

*Check the box to remove members from the mailing list or click on the name to view the details.

Name	Email Address	Company Name
<input type="checkbox"/>		
<input type="checkbox"/>	<i>SAMPLE</i>	
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

[Check All](#) - [Clear All](#)

Membership Applications

In an effort to streamline the RIMS application process, potential members now have the ability to apply for membership online on the RIMS Web site. The simpler the membership application process, the easier it will be for you to guide someone through joining online, as well as to approve applications that have been submitted. The online process cuts down on the amount of paper that you receive and aids in your record keeping. This simple multi-screen process allows the applicant to either pay by check or credit card. When an online application is submitted and payment is received, the application is sent to the Membership Director and President at the local chapter for review and approval. Approving applications is done directly on the RIMS Web site.

When an application is submitted and paid in full, you will receive an e-mail notification with the electronic application attached for your approval. You may have already started receiving these e-mails. In each e-mail you will receive the name of the applicant, the type of membership they applied for, and all pertinent information you will need to approve the application. The information you see on the online application is identical to the information we collect on paper applications.

It is important that you approve applications in a timely manner, taking no more than 2-4 weeks. We're sure that you want to welcome your new members as soon as possible and get them involved in chapter activities.

Approving Online Membership Applications

- Go to: WWW.RIMS.ORG
- Log on. (Your login is your e-mail address, and your password is your last name, unless you have changed your password.)

GO TO:

- [Chapters](#)
- [Chapter Officer Tools and Resources](#)
- [Membership Management](#)
- [Approve Applications](#)

See page 19 for sample of Approve Member Application Screen.

- Click the number listed under the heading **ID** to see a copy of the application.
- Click the Back button on your screen to be brought back to the approval page.
- Click the text under the heading **CHAPTER STATUS** (it will say pending). Approve only the applications for the e-mails you have received.

- You will be taken to the **Chapter Approval Screen**. (Sample on page 20)
- Use the drop down menu under **Chapter Approval** heading to Approve or Decline the applications.
- Your name and the date of approval will be stamped on the online application.
- Click **Update** to send RIMS notification of approval.
- After you have approved the application, it will be displayed in the Recently Approved Applications area.
- You may also view all e-mails sent by RIMS to the member in the **Comments** section.
(Sample on page 20)

Not only can you approve your applications on this screen, you can also watch all the recent activity within your chapter.

- **Recently Approved Applications**, displays member's information, date the chapter approved the application, and the chapter officer who issued the approval.
- **Recently Removed Deputies**, displays member's information, the date they were removed from the membership, and a reason for the change if one was supplied to RIMS.
- **Recent Chapter Changes**, displays members who have requested that their local chapter be changed, along with the date the change was made.

Approve Member Applications

Approve Member Applications

Not only can you approve your applications on this screen, you can also watch all the recent activity within your chapter.

- **Recently Approved Applications**, displays member's information, date the chapter approved the application, and the chapter officer who issued the approval.
- **Recently Removed Deputies**, displays member's

information, the date they were removed from the membership, and a reason for the change if one was supplied to RIMS.

- **Recent Chapter Changes**, displays members who have requested that their local chapter be changed, along with the date the change was made.

Click on the ID number to view the application, or on the status to view the chapter approval status.

Membership Applications - 9 Found

ID	Type	Others Included	Name	Company	Date Applied	Chapter Status	RIMS Status	Payment
	Deputy	0			06/21/2004	Pending	Approved	N/A
	Deputy	0			04/15/2004	Pending	Approved	N/A
	Deputy	0			06/21/2004	Pending	Approved	N/A
	Company 1				04/15/2004	Pending	Approved	N/A
	Deputy	0			06/21/2004	Pending	Approved	N/A
	Professor	0	<i>SAMPLE</i>		04/15/2004	Pending	Approved	N/A

Recently Approved Applications - 23 Found

ID	Type	Others Included	Name	Company	Date Approved	Chapter Approval
	Deputy	0			06/07/2004	
					06/01/2004	
	Company 1				05/19/2004	
	Deputy	0			05/19/2004	
	Deputy	0			05/14/2004	

Note: If you have just approved an application and it is not showing, press the F5 key to refresh your screen.

Recently Removed Deputies - 10 Found

ID	Name	Company	Date Removed	Reason Removed
			06/15/2004	Left Company
			05/27/2004	Left Company
			05/18/2004	Left Company
			05/10/2004	Left Company
			05/08/2004	No Reason Supplied

Recent Chapter Changes

The individuals below have requested to change their local chapter.

Change Type	Name	Company	From/To Chapter	Date Changed
Addition	David Jones			03/15/2004

Chapter Approval Screen

[Click here](#) to go back to MemberAppList

Member(s):

Chapter Approval

Chapter Status: Pending

Chapter Officer Name: Choose One

Approved/Declined Date : Approved
Declined
Pending

Update

Comments

Comments : *(add comments above any existing comments)*

SAMPLE

Email Sent: 06/21/2004
From: jberman@rims.org
To:
CC:
Subject: New Online RIMS Benchmark Survey™

Hello David,

The RIMS Benchmark Survey™ is back..and we need your participation!

Additional Tools

E-Mail Manager

The E-Mail Manager tool allows you to expand the variables you use to contact members of your chapter. You have the option to select members by industry, interests, chapter roles, by events they may have attended in the past, Standard Industrial Classifications codes (SIC), etc.

For example, if you want to contact all members with an interest in Worker's Compensation in the Motor Freight Transportation and Warehousing industries who have an e-mail address, you can use this tool.

E-Mail Manager Instructions

- Go to WWW.RIMS.ORG
- Log on. (Your login is your e-mail address, and your password is your last name, unless you have changed your password.)

GO TO:

- **Chapters**
 - **Chapter Officer Tools and Resources**
 - **Communications Tools**
 - **E-mail Manager**
-
- Choose the variables you want to search by.
 - You have the following options to choose from: Member Type, Member Type (detailed), Chapter Role, SIC Code, Interests, Industries, Status, Date Joined, Membership Expiration, Record Last Updated, Chapter Officer Expiry Date, First Name, Last Name.
 - You can hold down the CONTROL key and scroll within these categories to make multiple selections.
 - You also have options for the information you want to extract. You can choose more than one.
 - Select:

- Do not include anyone who has indicated that they do not want to appear in the online directory;
- Do not include anyone who does not want their name and address released on a mailing list;
- Do not include anyone who does not want their name and address released on a mailing list as specified in the latest conference registration.

- Do not include anyone who does not want their contact details released to another member, upon that members request;

- Must be an E-Group chair;
- Only people without e-mail addresses;
- Only people with e-mail addresses;
- Everyone, regardless of whether they have an e-mail address.

- Include only those whose application for the above event(s) has not been processed.
- Include only those whose payment has **not** been received for the above event(s).
- Include only those who have **not** registered for the above event(s).
- Include only those who are first timers at the above event(s).

- Click on **SEARCH**
- You will have the following options (choose one):
 - Send e-mail to this group using RIMS E-Mail Manager (attachments allowed)
 - Send HTML & plain text e-mail to this group using RIMS E-Mail Manager
 - Create a distribution group and save in MY RIMSMAIL
 - Download information into a (.csv) file
 - Demographic information

E-Mail Manager Screen

Search Members

Enter one or more criteria to look for members in your chapter, or leave all them blank to get all the members:

City:

State/Province:
 Alabama
 Alaska
 Alberta
 Arizona

Member Type: *Hold ctrl key (or Apple key in Mac) to select multiple items
 Members(excluding Associates)
 Associates
 Non-Members
 Prospect

Member Type (detailed): *Hold ctrl key (or Apple key in Mac) to select multiple items
 Additional Deputy
 Affiliate
 Associate
 Cancel_Drop Member

Chapter Role: *Hold ctrl key (or Apple key in Mac) to select multiple items
 President
 Vice President
 First Vice President
 Second Vice President

SIC Code: *Hold ctrl key (or Apple key in Mac) to select multiple items
 0100 - Agricultural Production - Crops
 0111 - Wheat Farm
 0112 - Rice Farm
 0115 - Corn Farm

Interests: *Hold ctrl key (or Apple key in Mac) to select multiple items
 Alternative Risk Financing
 Benchmarking
 Broker Satisfaction
 Broker Selection

Industries: *Hold ctrl key (or Apple key in Mac) to select multiple items
 Agriculture
 Crops
 Livestock
 Services

Chapter Field:

Chapter Field Value:

Chapter Field Date: (mm/dd/yyyy format)

Status:
 A - Active
 I - Inactive (waiting for app approval)
 C - Cancelled

Date Joined: (mm/dd/yyyy format) (mm/dd/yyyy format)

Membership Expiration: (mm/dd/yyyy format) (mm/dd/yyyy format)

Record Last Updated: (mm/dd/yyyy format) (mm/dd/yyyy format)

Chapter Officer Expiry Date: (mm/dd/yyyy format) (mm/dd/yyyy format)

First Name:

Last Name:

Company Name:

Conference Year:

Exhibitors only

Paid and Not Paid

Exhibitors who have assigned E-Comps.

Buyers Guide Only -- expiration date between and (mm/dd/yyyy format)

Do not include anyone who has indicated that they do not want to appear in the online directory

Do not include anyone who does not want their name and address released on a mailing list as specified in their profile

Do not include anyone who does not want their name and address released on a mailing list as specified in the latest conference's registration

Do not include anyone who does not want their contact details released to another member, upon that members request

Must be an E-Group chair

Only people without e-mail addresses

Only people with e-mail addresses

Everyone, regardless of whether they have an e-mail address

Attended Any of the Following Events:
 2001 - Claims Management
 2001 - ARM 54 August
 2001 - Claims Management
 2001 - CLAIMS MANAGEMENT

Above Events with Registrant Class:

Include only those whose application for the above event(s) has not been processed.

Include only those whose payment has **not** been received for the above event(s).

Include only those who have **not** registered for the above event(s).

Include only those who are first timers at the above event(s).

Send e-mail to this group using RIMS E-Mail Manager

- Your **RIMSMAIL** address will automatically appear in the **FROM** field, however you can change this if you want.
- Add a **SUBJECT** and type your message.
- **BODY TEXT**
- Personalize
 - You can personalize your message by using the available body text variables such as [FirstName] and [City]. This will create an e-mail that inserts the first name and city name of each person like a mail merge.
- Using Templates
 - If you frequently send similar messages you can save the message as a template to be re-used.
 - Click into E-mail Templates
 - Click Create New (This will allow you to save the e-mail for future use.)
- Ignore the users **RIMSMAIL** preferences.
 - Some users prefer to have their mail remain on the RIMS server until they access it. The box at the bottom allows you to override that and send it directly to them at the e-mail address RIMS has on record. Use discretion when selecting this option.*
- Create a distribution group and save in My RIMSMAIL
 - If you plan to send several messages to the same group of individuals within a short period of time, you can save the names as a distribution group for future use. Normally, you would not want to do this to ensure that you have the most up to date information. RIMS updates member records every day.
- Click on **SUBMIT**
- **NAME** the group (this name will be visible to the group when you send e-mail).
For example: “XYZ Chapter Members” or “May Meeting Notice”
- Create a brief **DESCRIPTION** of the group so you will remember who they are. (This will NOT be visible to the group)

- Click on **SAVE**
- Download information into a .csv file. Use this option if you would like to download the data and use it in an Excel spreadsheet or import it into another program.
- Keep in mind that if you use the option of sending an e-mail through this system, your e-mail will be sent as straight text. This means the e-mail cannot contain any bold, italics, color, attachments, etc.

E-Mail Manager Results

E-Mail Manager

*From:

*Subject:

*Body Text:

SAMPLE

Upload Attachment: (optional)

Attachment Description:

Ignore the users RIMSMAIL preferences and send directly to them.

Body Text Variables:

- [MemberID]
- [Password]
- [MemberType]
- [CompanyName]
- [ProfessionalTitle]
- [Designations]
- [Status]
- [Prefix]
- [InformalFirstNames]
- [FirstName]
- [MiddleInitial]
- [LastName]
- [Suffix]
- [Address1]
- [Address2]
- [City]
- [StateCode]
- [Zip]
- [Country]
- [Tel]
- [Fax]
- [Email]
- [RegistrationOptions]
- [SessionSelections]
- [BoothsToVisit]
- [RecordLastUpdated]
- [UpdateProfileLink]
- [UpdateProfileNoLogin]
- [RegisterForConfNoLogin]
- [FirstChoice]
- [MaxEccmpsAvailable]
- [CornerNumb]
- [PaymentCost]
- [PaymentLink]
- Redirect Variables:** [help?](#)
- [LoginRedirectTemplate.cfm?]
- [LoginRedirectStatic]
- [LoginRedirect]

Membership Changes

Occasionally, Chapter officers may wish to notify RIMS staff of membership updates. If you have email, phone, fax or job title changes for your members, simply send an e-mail to membership@rims.org with the member's name, previous information and the update. Our member records department will update RIMS files.

If your chapter maintains lists of individuals who attend local chapter meetings but who are not members, or if you have extensive changes to be made to your existing membership records – RIMS can help.

Download the **“All Members and Non Members”** report in the Membership Reports area of the Web site. Save the file as an Excel spreadsheet.

Once you've done this, make any changes necessary and highlight them online in red. If you wish to let us know of a specific issue with a member, simply add a comments column at the end of the spreadsheet and type in the information in the spreadsheet i.e., “Bob Smith has left Company xxx and is no longer eligible for membership. Please remove him from our chapter database.”

After you have entered all the changes, please e-mail the spreadsheet to recordsmanagement@rims.org and a Records Management Department representative will contact you once the changes have been made. This may take a few days depending on the time of year.

Taking advantage of this service allows you to keep all of your chapter's membership information in one place for easy communication.

This is a valuable tool to both the chapter and RIMS in maintaining the integrity of RIMS membership data.

Membership Recruitment

Be sure to download the online Chapter Membership Drive Handbook located at

www.rims.org/membershipdrive Recruiting new members is one of the most important tasks that your chapter will face during the year. It is important because a growing chapter is a vibrant and healthy chapter. The only way to ensure that your chapter continues to be a strong, powerful voice for risk managers and the service providers in your area is to keep its numbers multiplying. Not only will you be increasing the knowledge base of your chapter, but also increasing dues revenue, which in turn will strengthen your chapter. The Membership Drive Handbook will help guide you through the steps of running a membership drive for your chapter and the volunteer pool.

RIMS Resources

RIMS is committed to make your role as your chapter's Membership Director as efficient, productive and enjoyable (yes, it is also supposed to be fun) as possible. As always, the Membership and Chapter Services staff is available to answer any questions that you might have. You can also access other Chapter Officers by posting a question to the Chapter Officers E-Group. Click into the E-Groups area of the RIMS Web site and select the Chapter Officers group. This is a great way to check in with other chapters and share ideas and solutions. You can also contact the Membership Department at membership@rims.org or **212-655-6040** and the Chapter Services Department at chapterservices@rims.org or **212-655-6041**.

The RIMS Web site has been designed with you in mind, to make you successful in your leadership role within your chapter. The tools provided within this handbook will put you on the road to managing your chapter's membership needs effectively with up to date information and easy to use reports.