



Statistics 101

Monthly DOP Statistical Reports
and
Membership Rosters



Statistical Information

- Some may feel that statistical information is boring
- We find it exciting and filled with opportunities to learn and understand
- In the business world, employees are just one of many valuable assets that include buildings, equipment, etc.
- In families, people are the most important asset ... but there are also homes, cars, possessions, investments, etc.
- In a charitable group such as ours, **members are our only real assets**



Statistical Information

- As individuals we keep tabs on ourselves and our families ...
 - We manage our time ... our activities ... our health ... our personal finances (income, spending, debt, assets) ... and much more
- As responsible officers of this large charitable organization, we also keep tabs on our membership and activities at Chapter, District and National levels through ...
 - Personal contact to check on members' well-being ... especially during this challenging period
 - Meetings, conferences, conventions and bulletins
 - Financial reports ... Chapter, District and National levels
 - Reviewing and utilizing monthly reports from headquarters
- Let's review two important HQ reports



Statistical Information

DOP STATISTICAL REPORTS

- Sent monthly in Excel format from HQ to District Governors
- DGs review these stats and forward to Chapter officers for follow-up
 - Save the Excel file to a PDF if an officer does not have Excel
- Chapter officers review the information and follow up with members to help ensure that information is correct and financial responsibilities are met

September 2020 Report ... has a slightly revised format starting with the Paid columns

Total Paid 2018 - Total Paid 2019 - Total Paid 2020

- Indicates the number of members for whom Per Capita has been paid only through that specific year
- The life members column has been eliminated
- Life members are listed in the on-line membership rosters and reports

Let's review ... using **District 21** and **Phaedra Chapter 064** as an example



DOP Statistical Report -2020

as of 9/30/2020

Chapter	City/State	Established	Initiated This Year	Reinstated This Year	Total Paid 2018	Total Paid 2019	Total Paid 2020
District 21							
001-EOS	San Francisco, CA	11/16/1929	0	0	1	24	54
004-ECHO	Oakland, CA	04/07/1933	0	0	4	21	27
005-ARTEMIS	Sacramento, CA	04/19/1933	2	0	0	37	12
018-SPARTA	Stockton, CA	09/28/1934	1	1	1	1	34
029-DAPHNE	San Jose, CA	03/17/1935	1	0	6	18	29
064-PHAEDRA	Modesto, CA	12/03/1937	1	1	0	6	37
071-LETO	Fresno, CA	04/04/1938	0	0	3	6	30
089-ELIS	Reno, NV	02/19/1940	0	0	6	8	33
273-MAEONIA	Valejo, CA	05/02/1954	0	0	0	0	0
290-URANIA	San Mateo, CA	04/24/1958	4	1	3	5	35
367-HARMONIA	Walnut Creek, CA	02/15/1984	0	0	1	14	16
District 21 Totals			9	3	25	140	307

Now let's look at Chapter 064-Phaedra



Chapter	City/State	Established	Initiated This Year	Reinstated This Year	Total Paid 2018	Total Paid 2019	Total Paid 2020
District 21							
064-PHAEDRA	Modesto, CA	12/03/1937	1	1	0	6	37
District 21 Totals			9	3	25	140	307

- DG Linda reviews D 21 by Chapter ... and for Phaedra 064 in Modesto, CA she knows that:
- The Chapter was established 12/03/1937 ... She might send a “Happy Anniversary” note to the Chapter President
- 1 new member was **Initiated** and 1 member was **Reinstated** since January 1, 2020
 - The Initiated and Reinstated numbers are based on the current calendar year
 - DG Linda and District Secretary Angela might verify these numbers against their records relative to the Growth & Expansion efforts at National and District levels ... and follow up with HQ if they find discrepancies
- **Total Paid 2018** ... 0 for Phaedra means that Per Capita has been paid for all members through 2018
(If it showed 1, that would mean that 1 member’s Per Capita has been paid for 2018 and is owing for 2019 & 2020)
- **Total Paid 2019** ... means that Per Capita for 6 members has been paid for 2019 and is owing for 2020
Linda would review the on-line Membership Roster for Phaedra to determine which members were not paid
- **Total Paid 2020** ... means that Per Capita has been paid for 37 members for 2020



DOP Statistical Report -2020

as of 9/30/2020

Want a little more information?

Since the Stats are sent in Excel format, it's easy for DGs and other officers to add columns to show total members, unpaid members and also calculate the percent unpaid if they want to do so ... or add manually if no Excel

Chapter	City/State	Established	Initiated This Year	Reinstated This Year	Total Paid 2018	Total Paid 2019	Total Paid 2020	Total Members	Unpaid Members	% Unpaid
District 21										
001-EOS	San Francisco, CA	11/16/1929	0	0	1	24	54	79	25	32%
004-ECHO	Oakland, CA	04/07/1933	0	0	4	21	27	52	25	48%
005-ARTEMIS	Sacramento, CA	04/19/1933	2	0	0	37	12	49	37	76%
018-SPARTA	Stockton, CA	09/28/1934	1	1	1	1	34	36	2	6%
029-DAPHNE	San Jose, CA	03/17/1935	1	0	6	18	29	53	24	45%
064-PHAEDRA	Modesto, CA	12/03/1937	1	1	0	6	37	43	6	14%
071-LETO	Fresno, CA	04/04/1938	0	0	3	6	30	39	9	23%
089-ELIS	Reno, NV	02/19/1940	0	0	6	8	33	47	14	30%
273-MAEONIA	Valejo, CA	05/02/1954	0	0	0	0	0	0	0	0%
290-URANIA	San Mateo, CA	04/24/1958	4	1	3	5	35	43	8	19%
367-HARMONIA	Walnut Creek, CA	02/15/1984	0	0	1	14	16	31	15	48%
District 21 Totals			9	3	25	140	307	472	165	35%

Total Members =
Sum of columns for
2018, 2019 and 2020

Unpaid Members =
Sum of columns for
2018 and 2019

% Unpaid =
Unpaid Members
divided by
Total Members

By adding these columns, DG Linda can readily see ...

- EOS 001 is still the largest Chapter in D 21
- Which Chapters might need follow up or to confirm if they have received dues but not yet submitted Per Capita
- D 21 has 472 members and Per Capita obligations have not been met for 165 of those members = 35% unpaid



Drilling Down to the On-Line Membership System

So who are the 6 members unpaid for 2020 in Phaedra 064 ... or those in your Districts or Chapters?

The top four District and Chapter officers can sign into the on-line **MEMBERSHIP SYSTEM** to find this information ...

<https://www.daughtersofpenelope.org/>

- In the ribbon, click on MEMBERS
- Under Membership System, click where indicated to log into the system
- Enter Username and Password and Sign In
- Under REPORTS choose IQA
- Select a query from the drop down
- Depending on your access level, choose Chapter Active Roster or District Chapter Roster - Active
- Exporting information to Excel is easiest ... or scroll to right to see all information
- Look at the Paid Through column and follow up with members not paid through 2020
- Also review the Chapter Delinquent Roster or District Chapter Roster - Delinquent as some members (those paid thru 2018) may have fallen into the delinquent status.

The appropriate Chapter officer should follow-up with the unpaid members, explain reinstatement options and attempt to bring unpaid members current

- Reinstatement during November waives the \$15 fee and covers only 2020 Per Capita of \$35
- Dues for 2021 must still be paid and are not covered in the November reinstatement



On-Line Membership System

Beyond reviewing the Active and Delinquent Rosters to determine members paid status ...

Officers at District and Chapter level should periodically log into the system and make necessary updates

Phone numbers, addresses, e-mails and date of birth

Cannot change other fields - Contact HQ if errors are found in the locked fields

And ... No, Ladies, please don't change your birthday! Age is a good thing!

Elena has created an excellent Step by Step Guide that can be found under MEMBERS on the website

If you have trouble with the system, you can reach out to another officer for help ... your Liaison, District Governor, etc. Sisters will help Sisters!

Elena is also available but has an extremely large workload, so first try to find help elsewhere.

You will find a **treasure trove** of great information on the system



On-Line Membership System

What's in the Treasure Trove of Information?

Information by member includes:

District ID - Chapter ID - Member ID - First Name - Last Name - Address - City - State - Zip
Birthdate - Email - Home Phone - Work Phone - Mobile Phone - Date Initiated -
Paid Through Date - Years of Service - Member Type

So you might

Review Years of Service

Send acknowledgement notes to members, present years of service pins, etc.

Review Birthdates

Send cards or e-mail wishes. Celebrate milestones!

Run the District or Chapter Life Member Roster – 50 Years

Celebrate membership longevity. Acknowledge in bulletins.

(See next slide for information on Life Members)

All this ... and much more ... can be found in the Membership System! Please utilize it.



Life Members

- There are **two (2) classifications of Life Members**
- **Life Members Per Capita Waived**
 - Have completed 50 continuous years of membership in the Order before January 1, 1999
 - Per Capita Waiver in Constitution ... Page 6 Section II
 - Per Capita shall be waived for a Daughter of Penelope who has completed fifty (50) continuous years of membership in the Order before January 1, 1999
- **Life Members**
 - Have attained at least 50 years of service
 - These members should be acknowledged for their service but still pay Per Capita to HQ



Suggestions for Timely Dues Collection

2020 has been a very difficult year and we understand there are sometimes financial hardships.

However, timely collection of dues and payment of per capita obligations is important to the financial health of the entire organization, not only this year but in all future years

If you know a member is facing a real hardship ...

- Consider having the Chapter cover her dues for just that year if finances permit
- Consider Chapter paying and collecting later
- Consider offering dues installment options
- A Sister or more than one Sister might quietly offer to pay dues for someone with hardship

Chapter Treasurers should also review their records to ensure that all Per Capita is sent promptly to HQ for members who have paid their Dues, including Per Capita, directly to the Chapter

- Payments can be made on-line using a debit or credit card



Suggestions for Timely Dues Collection

- Note that per our Constitution ... “Dues are payable in January each year”
- Explain to members how dues and HQ per capita payments are utilized
 - See breakdown on website under Webinars ... Membership System & Budget / Dues Breakdown <https://www.daughtersofpenelope.org/members>
- Sometimes members just don’t want to take the time to write and mail a check or prefer to use a credit or debit card
 - Does the chapter have an option for dues payment using Square or some other electronic payment device in-person or by phone ... my Chapter does and there is a small fee to use it
- At November, December and January meetings, whether in-person or Zoom, encourage members to pay the coming year dues so they are out of the way and the Chapter is current



Suggestions for Timely Dues Collection

- Mail a personal letter or note card in early January from Chapter President, Secretary or Treasurer with addressed & stamped envelope
- Monthly bulletins include a request to pay dues using an attention getting call-out or highlight
- E-mails and/or phone call follow-up
- Have a fundraiser to partially offset dues
- Offer an incentive for payment by a certain date such as December 31 for the coming year's dues
 - Paid members entered into a drawing where one member wins dues paid by Chapter for the following year
- Sometimes members just simply forget to pay their dues, so gentle reminders can be helpful.



Summary

- Statistics and reports are a valuable tool to understand and grow our membership
- Databases and systems are only as good as the information they contain
- Personal contact is even more valuable
- We have an outstanding organization consisting of talented members from all walks of life
- Thank you for taking time to attend this meeting ... and for all you do for each other and for the Daughters of Penelope!
- Please reach out to me if you have questions regarding this presentation, Excel, etc.
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I LOVE
the
DAUGHTERS
OF PENELOPE!