LEYM Database Manager's Annual Sessions Report for 2021   7/13/2021 Lynda Rose

Meetings that have responded to update information: (11 of 19)

Ann Arbor MM	Grand Rapids MM	Oberlin MM
Athens MM	Granville MM	Pittsburgh MM
Broadmead MM	Kalamazoo MM	Wooster MM
Detroit MM	North Columbus MM	

Monthly Meetings that have not responded to update information: (8 of 19)

Akron MM	Delaware MM	Mid-Ohio Valley MM
Birmingham MM	Holland MM	Red Cedar MM
Cleveland MM	Kent MM	

We are making progress on updating and correcting information in Salesforce Database.

One of the main questions is if we want to categorize the children and/or teens by age. At this point we are only using broad categories as follows: Member, Attender, Child Member or Inactive. Salesforce has the capability to identify age if we want to put in an age. This would allow us to pull a report based on age, like for children in a meeting. The categories listed above (member, attender, child member or inactive) must be entered manually and if it changes, it must be manually changed. If we identify children by age, the record changes automatically with time. My recommendation is to use January 1 as the month and day, then use the child's birth year. This would work in Salesforce and avoid using actual birth dates. No other birth dates need to be entered, just for the children.

Another question that has come up is how we want to handle inactive contacts. Do we want to delete persons that become inactive, move, or are no longer involved? Or do we hold that information and categorize them as inactive? There is a separate entry for deceased folks.

To summarize, annual updating of Monthly Meeting Contact information is in progress. 2 questions are: 1.) Do we want to use birth year dates to identify children, teens, & young adults?

2.) Do we want to delete a person's contact information when they become inactive?