



HOUSTON LIVESTOCK SHOW AND

**ARODEO**™

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# MEMBERSHIP DESIGNER TRAINING

Online Account and Chairman Tools



# VOLUNTEER INTERFACES

The Membership Office works with volunteers and provides assistance with:

Customer Support	Distribution/Will Call	Additional Items
<ul style="list-style-type: none"><li>• New Memberships</li><li>• Membership Renewals</li><li>• Committee dues payments</li><li>• Online account customer support</li><li>• General committee information</li></ul>	<ul style="list-style-type: none"><li>• Badges</li><li>• General volunteer parking</li><li>• Lifetime Committeeman parking</li><li>• Corral Club drink ticket orders</li><li>• Business card orders</li></ul>	<ul style="list-style-type: none"><li>• Indemnity Agreements</li><li>• Legal Name Verifications<ul style="list-style-type: none"><li>• New Volunteers</li><li>• Name Changes</li></ul></li><li>• Volunteer background checks</li><li>• Harassment Prevention Training</li><li>• Lifetime Committeemen</li></ul>



# COMMITTEE LEADERSHIP INTERFACES

The Membership Office works with the Committee Hierarchy and Staff Coordinator by:

- Providing support for online Chairman Tools
  - Exception: Shiftboard
- Clearing & reopening committee volunteer request lists (May 1)
- Updating titles for Chairmen and Officers
- Updating titles for Lifetime Committeemen (LTC)
- Data entry of any manual 5000/6000 account deposits
  - Committee submits cash/check deposits to staff coordinator.
- Organizing badge release/distribution with Staff Coordinator/Chairman



# IMPORTANT POINTS

- Indemnity Agreement must now be completed ANNUALLY.
  - All volunteers who have signed prior to May 1st, 2023 will have to sign a new agreement for the 2024 Show year.
  - All Indemnity Agreements will be cleared on May 1st each year.
- Titles are updated for new LTC.
- Contact all applicants on your volunteer request list.
  - If you have no openings, please refer the member back to the Volunteer Request list or to the membership office.
  - Helpful Tip: Our automatic email to new members suggests a 2-week waiting period to hear from committees. If your committee does not recruit until a specific time of year, please let interested members and membership office know.
- Volunteer Request page in Chairman Tools
  - Turn listing on the Volunteer Request page on or off as needed
  - Add or remove waitlist members

# COMMITTEE DUES

- Changes to your committee dues amount
  - Change amount- Staff Coordinator informs accounting and they make this change
  - If dues are changed midway though the year, not everyone pays the same amount
- Are Committee dues required for badge pick up?
  - “hold badge without dues” flag in the badge release section
  - To change the requirement, email [membership@rodeohouston.com](mailto:membership@rodeohouston.com)



# BADGE PRE-PACKAGING

- Badge Pre-packaging
  - Staff Coordinator or Committee leadership completes a membership form with detailed instructions & timeline.
  - We encourage you to use this option – particularly if you will be distributing other items to your committee members at the same meeting.
  - Items required for pre-packaging a badge:
    - Online badge release
    - Legal name verification, background check & indemnity
    - Show membership
    - Committee dues (if you have designated this as a badge pickup requirement.)



# LIFETIME COMMITTEEMEN

- Are **required** to pay Show and Committee dues\*
  - Unpaid **Committee** dues will result in removal from committee roster
    - \*This is only if the committee dues are required by the committee
    - This is only Lifetime Committeemen and does not include Lifetime Directors or LVPs
  - Unpaid **Show** dues will result in removal from Lifetime Committeeman roster as well as Committee Roster.
- Are **not required** to remain on a Committee roster
  - Still receive badge/parking benefits
- Unable to join a new committee roster and/or serve in leadership
  - If they are asked to serve in leadership (i.e. assistant captain), they must revoke their LTC status
- LTC work requirement is determined by the Committee



# INELIGIBLE TO SERVE

- Volunteers become ineligible to serve if they have an outstanding account balance after the payment deadline (For 2023 Show, ineligible list was finalized June 15, 2023.)
  - Related accounts (spouse) also become ineligible.

Membership removes all ineligible members from committee rosters.

If the account balance is cleared, the member may request reinstatement through their committee Chairman.

If the committee chairman wishes to add them back to the committee, they can submit a Reinstatement Request in Chairman Tools.

OR

If the member clears their account balance but does not request reinstatement, they cannot serve as a volunteer for the current Show year.

- When permanent ineligible status is issued by the legal or executive offices, membership will confirm roster removal and ineligible designation.
  - The system will block these volunteers from being added to a committee roster.






# COMMITTEE SERVICE ARCHIVE

- Friday after the Show ends.
- Committee service history must be given to receive credit (process change in 2021).
- If you have committee members who have already earned a badge with another committee, be sure to also give them service history on your committee **if** they have met your committee requirements.
- There are cases where service history is not given. We refer the volunteer to contact their Chairman/leadership to obtain details. In the event they should have received service history, the **Chairman** must provide **written confirmation** (email) to Membership to request service history to be added.



# HARASSMENT PREVENTION TRAINING

- Required for all Captains, Vice Chairmen, Chairmen
  - Assistant captains are not required to complete
- Membership Office assigns training based on title and sends a notification to the volunteer. **Not accessible through the online account.**
- Training is valid for two show years
- Initial Deadline date: November 15
  - Deadline dates are tiered based on title changes
- Updated training information is available every Monday after 12 PM 

# ONLINE ACCOUNT



# MEMBERSHIP STATUS

## Membership and Committee Information

### Current Committee Appointments

COMMITTEE	TITLE	SUBCOMMITTEE
Membership	Chairman	VIP Team, Leadership
Calf Scramble Donors	Committee Member	Santa Gertrudis
Scholarship Judging	Committee Member	

### Membership Status

	Yes	No
Indemnity Signed	✓	
Legal Name Verified	✓	
Membership Dues Paid		X
Membership Badge Released		X
Calf Scramble Donors Dues Paid		X
Calf Scramble Donors Badge Released		X
Corral Club Membership		None
Badge Pickup/Pre-Packaged Status		

[Click here to learn more](#)

### Committee History

Show Year	Committee	Title
2023	Membership	Chairman
2023	Poultry Auction	Committee Member
2022	Membership	Chairman

### Membership History

Show Year	Type	Purchase Date
2000	Life Membership	02/03/2000

[Click here to learn more](#)

If you find a red "X" by any of the following:

- **Indemnity Signed:** Please contact the Membership Office to have a form sent to you to complete and return.
- **Verify Legal Name:** Email/fax/or mail a copy of your driver's license to the Membership Office at [membership@rodeohouston.com](mailto:membership@rodeohouston.com)
- **Dues Paid:** In your online account, click the "Menu" button. From the side menu that appears, click the "Dues Payment" link. Any dues owed will be listed under the "Current Year Committee Dues" section.
- **Badge Released:** Contact your committee leadership.

If you have any questions, please contact the Membership Office.

Membership Office  
 (Phone): 832-667-1073  
 (Fax) 832-667-1235  
 E-mail: [membership@rodeohouston.com](mailto:membership@rodeohouston.com)



# CERTIFICATIONS TRAINING

## Certifications Training

### Current Certifications

All current Certifications are listed below. If a Certification is not listed, the Certification has either expired or has not been completed.

Certification	Certification Details	Certified Date	Expiration Date
Sexual Harassment	Sexual Harassment Training	November 29, 2019	November 29, 2021
GOLF CART AND UTILITY VEHICLE SAFETY TRAINING	The Golf Cart and Utility Vehicle Safety Training Certification is required for any Show volunteer who will operate a Golf Cart/Utility Vehicle during the course of their volunteer duties.	November 17, 2017	November 17, 2020

### Registered Certifications

All Certifications for which you are currently registered are listed below.

Certification	Session Date & Time	Location	Location Description
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### Available Certifications

All Certifications that you are eligible to register for are listed below. Consult with your Committee Chairman if you are not sure about registering for a Certification for your committee. Select the Certification and all available sessions will be listed for registration. You can only register for one session for any given Certification.

If a Certification is not listed for selection it may be because:

- Committee dues have not been paid for the committee with a Certification requirement.
- The Certification has been completed and is current.
- The Certification is not available for registration based on your committee assignment.
- The Certification has no available sessions for online registration at this time.

Select Certification: **No Certifications available for registration.**

- Certifications expiring prior to the last day of Show will now allow the volunteer to register for a new session before expiration.
- ONLY if new session is available for registration
- All certifications are displayed



# CHAIRMAN TOOLS



# CHAIRMAN TOOLS

## COMMITTEE COMMUNICATION

- Home page post
- Announcement
- Bulk Email
- Featured Link

## REPORTS

- Budget
- Emergency Contact
- Roster
  - Full Roster
  - Light Roster
  - Roster Request
- History
  - Sales History
  - Service History
- Volunteer Request

## ROSTER MANAGEMENT

- Roster
- Request Tracking
- Roster Request
- Hierarchy Request
- Volunteer Request List
- Subcommittee Manager

## BADGE RELEASE/COMMITTEE SERVICE

## TASK MANAGEMENT


- Equipment Request
- Meeting Request
- Shiftboard


## SYSTEM MANAGEMENT

- Committee Permissions
- Delete Member Photo Tool
- Other Committee Request
  - Badge/Parking Replacement
  - Reinstatement



# COMMITTEE COMMUNICATION

 Menu

 Welcome

## Committee Communication

**COMMITTEE:**

Membership

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**Add Committee Communication**

Select the Communication Type from the list to add a new committee communication.

Communication Type:

OPTIONS	ACCESS	NOTES
<ul style="list-style-type: none"><li>• Home page post</li><li>• Announcement</li><li>• Bulk Email</li><li>• Featured Link</li></ul>	<ul style="list-style-type: none"><li>• Chairmen</li><li>• Designees</li><li>• Bulk Mailer Designees</li><li>• Staff Coordinators</li><li>• Management Coordinators</li></ul>	Check with your staff coordinator prior to posting messages & sending bulk emails. They will let you know if approvals are needed.





# HOME PAGE POST

## Committee Communication

### COMMITTEE:

MEMBERSHIP

### Add Committee Communication

Select the Communication Type from the list to add a new committee communication.

Communication Type:

Home Page Post

**Home Page Post** - This will display a message for all volunteers on the committee roster in the Home Page Post panel of the Home page. Volunteers will not see this message until they log into the Membership portal.

Subject Line: \*

Content: \*

Start Date: \*

mm/dd/yyyy

End Date: \*

mm/dd/yyyy

Save

Cancel

- Copy/paste your text
  - the screen may time out and your text will be lost.
- Set a start and end date.
- Text only, no attachments.
- If the wrong communication has been selected, you must cancel and select a new communication type from the drop-down list.



# ANNOUNCEMENT

## Committee Communication

### COMMITTEE:

MEMBERSHIP

### Add Committee Communication

Select the Communication Type from the list to add a new committee communication.

Communication Type:

**Committee Announcement** - This will display a link to a document for all volunteers on the committee roster in the Committee Announcement panel of the Home Page. Volunteers will not see this announcement until they log into the Membership portal.

Title: \*

Start Date: \*

End Date: \*

Url	Link Name	File/Url	
<input type="checkbox"/>	<input type="text"/>	<input type="text"/> <input type="button" value="Browse..."/>	<input type="button" value="Add"/>

- Set a start and end date.
- File/URL 10MB single file size restriction
  - Overall max restriction is 30MB
- URL must be hosted in HLSR's domain
  - Staff Coordinator provides file to IS Department (SD+)
- Export Tracking
  - Because of this feature, there can be no changes in the File/URL. If there are any changes, the original file must be deleted and a new file uploaded.



# COMMITTEE COMMUNICATION HISTORY

## Committee Communication History

Communication Type	Title or Subject	Recipient	Start Date	End Date	Author		
ANNOUNCEMENT	test with multiple attachments	CARNIVAL TICKET SALES	06/19/2018	11/22/2019		<a href="#">Edit</a>	<a href="#">Export Tracking</a>
ANNOUNCEMENT	Test with one attachment	CARNIVAL TICKET SALES	06/19/2018	07/24/2020		<a href="#">Edit</a>	<a href="#">Export Tracking</a>
HOME PAGE POST	Current Committee Post #1	CARNIVAL TICKET SALES	06/19/2018	07/09/2018		<a href="#">Edit</a>	<a href="#">Export Tracking</a>

- The Chairman and IS Designee are able to view all committee communication postings
- Export Tracking allows you to see who has viewed that communication.
- To edit the text of the document, click edit.
- Communications are unable to be deleted. However, you can change the end date by clicking the edit button and entering a past date for the file to be removed.



# BULK EMAIL

**Add Committee Communication**

Select the Communication Type from the list to add a new committee communication.

Communication Type:

**Bulk Email** - This will send an email to the email address on record for the selected recipients on the committee roster or waitlist.

Recipients: \*

Committee Dues Paid:  Yes  No

Show Dues Paid:  Yes  No

Indemnity:  Yes  No

Legal Name:  Yes  No

Sender: \*

Subject: \*

**IMPORTANT:** Combined file size cannot exceed 30 MB for all files added to a Bulk Email.  
Individual file size cannot exceed 10 MB.

Attachment 1:

Attachment 2:

Attachment 3:

Content:

- Select the entire committee or sub-committee.
  - Filter by Waitlist Status
  - Filter by Committee Requirements
- Emails will be sent from dedicated HLSR committee email addresses.
  - If your committee does not have a dedicated email, they will be sent from [noreply@hlsr.com](mailto:noreply@hlsr.com)
  - To create a dedicated email please have your staff coordinator submit a request to IS.
- You may attach up to 3 files
  - 10MB size limit per file.
- Copy/paste your text in full
  - Text will be lost if screen times out.



# FEATURED LINK

Welcome to the Houston Livestock Show and Rodeo Membership Site!

## COMMITTEE:

Cutting Horse

Example of Featured Link

Official Licensed Vendors

## Add Committee Communication

Select the Communication Type from the list to add a new committee communication.

Communication Type:

**Featured Link** -- This will display a link to a Web site for all volunteers on the committee roster just under the Committee Name on the Home page. Volunteers will not see Featured Links until they log into the Membership portal.

Start Date: \*

End Date: \*

Sort Order: \*

Subject Line for Featured \*  
Link:

URL: \*

Save

Cancel

- Staff Coordinator can post a featured link.
- Set a start and end date.
- Sort Order
  - If multiple links are being posted, enter a number to show which order they will appear in.
  - This will default to 1 or the next available number if current links exist.
- Subject Line
- URL
  - URL must begin with http:// or https://



# REPORTS

Chairman Tools - Reports

Committee: Membership

Report: --Select Report--

Output Format: XLS

Email Report:

**Generate Report**

- Select the report you would like to run from the drop-down box
- Select which output format you prefer
- If you would like the report to be emailed rather than open as a pop up, click **email report**
- Finally, click **generate report**.



# ROSTER REPORTS

- **Full Roster Download\***
  - For committee leadership use only – cannot be distributed to the full committee
  - Verify business purpose before providing an entire committee roster to different levels of leadership.
- **Light Roster Download\***
  - Includes permission to publish information – can be distributed to the full committee
  - .pdf version contains a thumbnail of the photo on their online account while the excel version contains photo links
- **Roster Request**
  - Includes details regarding requests submitted by the committee
  - Roster Request
  - Hierarchy Request tab
  - This is an easy way to find information on requests that are submitted
- **Volunteer Request\***
  - For recruiting purposes only – verify business purpose before sharing this list.

**\*Download information is only available for current show year.**



# OTHER REPORTS

## – Budget

- This allows you to request an emailed spreadsheet of your committee budget and recorded expenses for that budget period.
- Select the Show year (not calendar year)
- It is always good to double check with your staff/management coordinator that the report is the most accurate numbers as some expenses may be pending.

## – Emergency Contact

- This includes emergency contact information for that volunteer if information was entered in the contact information section.

## – Sales History

- This allows you to view or email sales history for your committee members by Show year.
- The emailed version is more versatile and easier to view.
  - This sales report might become too large to be emailed as your sales year comes to a close.
  - Please contact your staff coordinator for a report if the system fails to generate an email to you.

## – Service History

- This spreadsheet will list the volunteer years of service for every person who has served on your committee since 1980.
- Check the box to run the report for current committee volunteers only.
- Second tab on excel download shows summary of current year committee service history status.

## – Certifications Download

- This will include current and registered certifications including date certified, and the expiration date.
- This includes certification for all committees if the individual is on multiple committees that require certification.






# ROSTER PAGE

Titles	Max Count	Actual Count	Available Positions
Chairman	1	1	0
Vice Chairman	5	5	0
Captain	5	5	0
Assistant Captain	7	5	2
Coordinator	1	1	0
Past Committee Chairman	4	4	0
Committee Member	117	96	21
Officer in Charge	1	1	0
Lifetime Vice Presidents		7	
Lifetime Director		2	
Lifetime Committeemen		7	
Lifetime Committeeman/PCC		1	
Staff Coordinator	0		
Totals:	141	135	23

Click **Refresh Roster** to view your committee roster here.

Click **Export Roster** to open your committee roster in an Excel file.

For help to TURN OFF a ROOKIE FLAG for a veteran member who has returned to your roster click here: 

**Refresh Roster**

**Export Roster**

Show 50 records

Title	Customer Number	Name	Rookie	Preferred Name	Subcommittee			Show Dues	Committee Dues	Indemnity	Badge Released	Badge Released
					1	2	3					
Chairman					Vip Team	810 Wallet Wranglers	Rodeo Rebels	Y	Y	Y	N	
Vice Chairman			✓		Vip Team			Y	N	N	N	
Vice Chairman					Vip Team			Y	N	N	N	
Vice Chairman					Vip Team			Y	N	Y	N	
Vice Chairman					Vip Team			Y	N	N	N	

- View the Committee roster summary
- Click **refresh roster** to have a quick view
  - Clicking the table column headers allows you to sort the roster information
  - You can update the rookie flag here by clicking the check in the rookie column
- Click **export roster** to view the information in an excel file.



# REQUEST TRACKING PAGE

## Request Tracking

### In Progress, Other Users

Request	Committee	Status	Type	Submit Date	Last Update	Updated By	Request Change Type
100473	Membership	ENTERED	Roster		7/29/2020	Jack Ferrante	REMOVE
78744	Membership	ENTERED	Hierarchy	12/9/2019	12/9/2019	Jack Ferrante	HIERARCHY
76812	Membership	ENTERED	Roster	10/7/2019	10/7/2019	Joseph Chandler	
74764	Membership	ENTERED	Roster	8/3/2019	8/3/2019	Joseph Chandler	

### For Continuation

	Request	Committee	Status	Type	Submit Date	Last Update	Updated By	Request Change Type
Delete	100414	Membership	ENTERED	Roster		7/9/2020	Sally Allen	ADD, TITLE
Delete	100360	Membership	ENTERED	Roster		6/25/2020	Sally Allen	TITLE
Delete	78155	Membership	ENTERED	Hierarchy	11/14/2019	11/14/2019	Sally Allen	HIERARCHY

### For Action

Request	Committee	Status	Type	Submit Date	Last Update	Updated By	Entry Count	Request Change Type
100329	Membership	WAITING	Ineligible	6/18/2020	6/18/2020	Sally Allen		INELIGIBLE

### For Review

Request	Committee	Status	Type	Submit Date	Last Update	Updated By	Next	Request Change Type
100468	Membership	CANCELLED	Roster		7/29/2020	Sally Allen	Sally Allen	REMOVE
100467	Membership	CANCELLED	Roster		8/5/2020	Sally Allen	Sally Allen	

**In Progress, Other Users:** This is only visible for the Chairman to see requests that have not yet been submitted.

**For Continuation:** Forms that have been started by the account owner but not submitted.

**For Action:** Forms that are pending approval by the account owner.

**For Review:** A view only format that allows the chairmen, designee(s), SC/MC and Officer to see the status of all requests.

- To open a request, click on the request ID
- To delete requests that you no longer wish to continue, click **Delete** next to the request ID



# ROSTER REQUEST TABLE

Non-Counting Titles
Officer • Limited to one
Vice President • Not the Committee OIC
Lifetime Vice President
Lifetime Director
Lifetime Committeeman

Title	Max Count	Actual Count	In Process	This Request	Available Positions
Chairman	1	1			0
Vice Chairman	5	5			0
Captain	5	5			0
Assistant Captain	7	5			2
Coordinator	1	1			0
Past Committee Chairman	4	4			0
Committee Member	117	96		1	20
Officer in Charge	1	1			0
Lifetime Vice Presidents		7			-7
Lifetime Director		2			-2
Lifetime Committeemen		7			-7
Lifetime Committeeman/PCC		1			-1
Staff Coordinator	0				0
<b>Total</b>	<b>141</b>	<b>135</b>	<b>0</b>	<b>1</b>	<b>5</b>

- This grid is visible on several pages
- View your committee's maximums and actual counts by title, as well as the number of members with non-counting titles.
- View the changes that may be in progress on forms that are pending approval



# ROSTER REQUEST

## Roster Request

**COMMITTEE:**

Membership

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Request Type:

Change Type:

Member:

**Add**

- Select your request type:
  - Addition or Title Change
  - Removal
  - Removal-Leadership Recommendation
    - Selecting “Addition” will bring up your volunteer request list
    - All other selections will require the volunteer’s member number
- Select your Change type:
  - Addition
  - Title Change
- Click **Add** (adds to form, not to committee).
- Every time you click to create a Roster Change Request form it saves a copy in the For Continuation Section of Request Tracking even if the form has no entries.
- Every request form is assigned a unique request ID.



# ROSTER REQUEST PROCESS

Request Type: Addition or Title Change

Change Type:

Member:

Member #: 1261841

Member Name: Mcneil, Stacy Sledge

Change Type: TITLE

New Title:

Existing Title: Committee Member

Rodeo Scholar: No

Past JRC Member: No

Reason:

Member #: 1117928

Member Name: Tullis, Georgia Faith

Change Type: ADD

New Title:

New Subcommittee:

Rookie Flag:

Rodeo Scholar: No

Past JRC Member: No

Reason:

- For Additions you must select title, but subcommittee selection is optional at this point.
- For Title Changes select the new title.
- To add another person to the form, select the change type at the top
  - Select the member from the drop down for a new member
  - Enter the member number for a title change
- Click **Add** to add them to the request
  - Up to 50 entries can be added on one request
- To delete one entry on the form, click the **delete** button right next to the member number
- Click save to continue later or
- Click submit to submit the request



# ROSTER REMOVAL HISTORY

Request Type: Addition or Title Change

Change Type:

Member:

---

Member #: 00000

Member Name: Doe, Jane

Change Type: ADD

New Title:

New Subcommittee:

Rookie Flag:

Rodeo Scholar: No

Past JRC Member: No

Reason:

- When you are adding individuals from the waitlist, specified committees will be able to see if members have previously been removed from committee rosters.
  - Only removals since 2014 are available online.
- **We ask that roster designees keep any removal history confidential.**
  - **It is only for informational purposes to assist in the recruiting process.**

**Roster Removal History**

Member Name Doe, Jane

Show Year	Committee	Reason
2019	Gatekeepers	No Show for all assignments



# ROSTER REMOVAL

Request Type: Removal  
For important instructions on Roster Removals click here: [?](#)

Member #:

---

Member #: 123456

Member Name: Doe, Jane

Change Type: REMOVE

Existing Title: Vice Chairman

Reason:

- Select a reason for the removal from the drop-down list.
- You may have up to 50 entries on a form.
  - These should be submitted in groups on a single form whenever possible.
  - Exception: if the committee member is on the Board of Directors, use a single form as the approval chain is longer.
- If the form is finished click “**Submit**” or click “**Save**” to continue or review the form later.



# ROSTER REMOVAL REASONS

General Reasons	Specific Reasons
No Response to Committee	Reached JRC age limit*
Member Resigned	Corral Club Transfer*
Did Not Meet Membership/Dues Requirements	Deceased Member
Did Not Meet Requirements	<b>Leadership Recommendation</b>
<b>No Show for all assignments</b>	


- **“No Show for all assignments”** has been developed to identify individuals who join a committee and receive a badge prior to Show, but do not show up for a single assignment.
- Select “Did Not Meet Requirements” for volunteers who only worked a portion of their assignments.
- Leadership Recommendation will require a different roster removal request





# ROSTER REMOVAL

## LEADERSHIP RECOMMENDATION

**Request Type:** Removal - Leadership Recommendation  
*For important instructions on Roster Removals click here:* 

**Member #:**

**Add**

---

**Member #:** 269092 **Delete**

**Member Name:** Wahrenberger, Richard E.

**Change Type:** REMOVE-LEADERSHIP  
 Refer To Legal

**Existing Title:** Committee Member

**Reason:**

**Save** **Submit**

- Leadership Recommendation Roster Removals should be submitted one at a time to facilitate the review process.
- Removals that are Leadership Recommendation Removals with a **REFER TO LEGAL FLAG** must be submitted one at a time.
- **Refer to Legal is only for severe violations of Show policy or actions that put individuals or the Show at risk.**
- If the form is finished click “**Submit**” or click “**Save**” to continue or review the form later.



# HIERARCHY REQUEST

## ADJUSTING COMMITTEE MAX

Hierarchy Request

**COMMITTEE:**

Membership

Title	Current Max	%	Requested Max	%
Chairman	1	0.71%	<input type="text" value="1"/>	0.71%
Vice Chairman	5	3.57%	<input type="text" value="5"/>	3.57%
Captain	5	3.57%	<input type="text" value="5"/>	3.57%
Assistant Captain	7	5.00%	<input type="text" value="5"/>	3.57%
Coordinator	1	0.71%	<input type="text" value="1"/>	0.71%
Past Committee Chairman	4	2.86%	<input type="text" value="4"/>	2.86%
Committee Member	117	83.57%	<input type="text" value="119"/>	85.00%
<b>Total</b>	<b>140</b>		<b>140</b>	

--Select One--

**Reason For Changes:**  
(2,000 character limit)

We would like to decrease assistant captains by 2 as those positions would be better served as rookie members.]

- Adjust “Requested Max”
- Be sure that the total is correct
- Enter Reason
  - Recommend copy/paste
  - Timeout/drafts do not save
- **Submit**



# HIERARCHY REQUEST

## ADDING A NEW TITLE

Hierarchy Request

COMMITTEE:  
Membership

Title	Current Max	%	Requested Max	%
Chairman	1	%	<input type="text" value="1"/>	0.71%
Vice Chairman	5	%	<input type="text" value="5"/>	3.57%
Captain	5	%	<input type="text" value="5"/>	3.57%
Assistant Captain	7	%	<input type="text" value="7"/>	5.00%
Coordinator	1	%	<input type="text" value="1"/>	0.71%
Past Committee Chairman	4	%	<input type="text" value="4"/>	2.86%
Committee Member	117	%	<input type="text" value="116"/>	82.86%
Ambassador	0	%	<input type="text" value="1"/>	0.71%
<b>Total</b>	<b>140</b>		<b>140</b>	

--Select One--

Reason For Changes:  
(2,000 character limit)

We would like to add an ambassador position to help with our new program.]

- Select title from drop down box
- Click **Add Title**
  - This will add a new line in the table
- Enter number of positions you are requesting in the requested max
- Adjust number of positions for other titles as needed
  - Make sure the total matches what is requested
- Enter Reason
- **Submit**



# COMMITTEE REQUEST

## REINSTATEMENT REQUEST

### Committee Request

**COMMITTEE:**

Membership

**Request Type:**

Committeeman Reinstatement Request

In order to become eligible for committee reinstatement, a volunteer must first clear his/her Show account. The volunteer must then write a letter to the Show president requesting reinstatement to the committee, and explain the circumstances for not meeting the payment deadline. The volunteer's letter must be attached to the reinstatement request.

Upon receipt of the volunteer's letter of explanation, this form is initiated by the chairman who inserts their comments in the recommendation text box.

Select the volunteer from the drop down list, enter all required fields, attach the volunteer's reinstatement request letter, and submit. Like a roster form, this is an initial submission. Be sure to go to your Request Tracking Page and approve the request there so it can move to the next approver's account.

**Member Name:**

**Letter of Explanation:**    
File types allowed are .pdf, .jpg, .jpeg, .gif. Max File size is 4 MB

**Recommendation:**   
Max 500 characters

- Select member name from drop down box
- Upload letter of Explanation from the committee member
- Enter your recommendation
- **Submit**



# COMMITTEE REQUEST

## BADGE REPLACEMENT REQUEST

Committee Request

**COMMITTEE:**

Membership ▾

**Request Type:**

Badge Parking Request ▾

Request Type:  
Badge Parking Request ▾  
--Select One--  
Badge Parking Request  
Committeeman Reinstatement Request

Fig. 1

A single request can be entered for both a replacement badge and replacement parking passes as required, but the request can only be submitted for a single member. If multiple members need replacement badges and/or parking passes, separate requests must be entered for each member.

Damaged or broken badges can be exchanged by the volunteer at the Membership Office during office hours.

Request Type: Badge ▾

Member: --Select One-- ▾

Add

Request Type: --Select One-- ▾

Member: --Select One-- ▾

Add

Fig. 2

- Select the item you are requesting to replace from drop down box (badge parking request)
- Select item (badge or parking) under Request Type
- Select Member under drop down boxes
- **Click Add**



# COMMITTEE REQUEST

## BADGE REPLACEMENT REQUEST, CONTINUED

### Replacement Badge/Parking Request - 112988

A single request can be entered for both a replacement badge and replacement parking passes as required, but the request can only be submitted for a single member. If multiple members need replacement badges and/or parking passes, separate requests must be entered for each member.

Damaged or broken badges can be exchanged by the volunteer at the Membership Office during office hours.

Request Type:

Show Year: 2023

Committee: Membership

Request Status: ENTERED

Approval Workflow		
	Date	Status
Originator/Submitter:	7/25/2022	ENTERED
Chairman:		
Officer in Charge:		
Staff Coordinator:		
Management Coordinator:		
Staff Coordinator:		
President:		

Member Name: A Membership Customer

Request Type: Badge

Replacement Reason:

Verification?:  Yes  No

Police Report:  No file chosen

File types allowed are .pdf, .jpg, .jpeg, .gif.  
Max File size is 4 MB

Explanation:

#### Previous Comments

- Under 'Request Type', you can add an additional item to same request. (If you first selected badge, you can add parking)
- Continue with the form and add any pertinent files if needed (police report if items were stolen and a report was filed)
- Click **Submit** once complete. \$30 replacement per item, if approved



# EQUIPMENT REQUESTS

**Equipment Request Details - Create New**

Equipment Requests must be submitted by **11/29/2020**

Request Type

**Requestor Information**

A single Equipment Request can be submitted for any ONE Committee, Contractor, or Other group. All requests for a single Requestor should be combined into one Equipment Request. When requesting equipment for multiple groups, separate Equipment Requests must be submitted.

**Date of Request:** 08/05/2020    **Submitted By:** Katie Lockett    **Contact Phone Number:**

**Department:**

**Requested For**     Contractor     Other   

[Add Other](#)

Equipment Type	Equipment Group	Start Date	End Date	Expense Code	Daily Cost	# of Days	Quantity	Total Cost	Status
----------------	-----------------	------------	----------	--------------	------------	-----------	----------	------------	--------

[Save Request](#)

[Return to Equipment Request List](#)

- Request Carts and other equipment
- Please contact the Operations department with any questions regarding requests.



# SUBCOMMITTEE MANAGER

## Subcommittee Manager

**Committee:**

A committee member may serve on up to three subcommittees at a time. Locate a member by entering a Member Number or selecting a Member Name, Title and/or Subcommittee and select the 'Find' button. Once the appropriate subcommittee(s) have been selected for the member, select the 'Save' button to update their subcommittee assignment.

To remove a member from a subcommittee, select 'None' from the subcommittee pick list and select the 'Save' button.

**Member Number:**

**Member Name:**

**Title:**

**Subcommittee:**

**Rookie:**

**Find** **Clear Filter**

Member Number	Member Name	Title	Rookie	Subcommittee 1	Subcommittee 2	Subcommittee 3
[REDACTED]	Lifetime Committeemen		<input type="checkbox"/>	-- None --	-- None --	-- None --
	Chairman		<input type="checkbox"/>	VIP Team	-- None --	-- None --
	Committee Member		<input type="checkbox"/>	Rough Riders	-- None --	-- None --

- This allows you to assign each of your committee members to up to three subcommittees.
- Subcommittees are included in your Full and Light Roster Downloads in the same order you see here 
- If you need to update subcommittee names and/or delete ones you no longer use, email [membership@hlsr.com](mailto:membership@hlsr.com) with details.



# VOLUNTEER REQUEST LIST

Volunteer Request

Committee:

Committee Volunteer Request End Date:

Input a Customer Number and click Add to place another member on a committee contact list,  
or click Remove to remove another member from the committee contact list

Customer Number:

Customer Number	Customer Name	Request Date	Status	Phone	Phone Type
		8/5/2020	-- Select One --		Cell Phone
		7/23/2020	-- Select One --		Cell Phone
		7/23/2020	-- Select One --		Cell Phone
		7/18/2020	-- Select One --		Cell Phone
		7/17/2020	-- Select One --		Cell Phone
		7/15/2020	-- Select One --		Cell Phone
		7/14/2020	-- Select One --		Cell Phone

1 - 7 of 7

- Open/Close online Volunteer Request List:
  - Immediately remove - enter today's date
  - Future removal - enter future date
    - list will close at 12:01 AM
- Add/Remove individuals from the request list
  - Enter Member Number and click **Add** or **Remove**
  - Removal requires a reason
- Click **export** to view an excel file of the list
- Update request list status
  - Click **save** to assign the status
  - Send targeted emails through bulk mailer




# BADGE RELEASE

## Badge Release

Committee:

Title:  Subcommittee:

**Hold Badge Without Dues:** YES 

This setting determines if the Membership Office can distribute a volunteer's badge depending on whether you require the committee dues to be paid regardless of whether the badge has been released by the committee.

YES: Membership will not issue the badge until dues are paid even if the badge is released.

NO: Membership will be able to issue the badge if dues are not paid if the badge is released.

If you would like to change your hold preference, please send an email to [membership@rodeohouston.com](mailto:membership@rodeohouston.com)

Show  records

	Member Number	Member Name	Dues Paid	Badge Status	Released By	Released Date	Other Committee Badge Release Status	Pickup Date
+ <input type="checkbox"/>	1023575	A Membership Customer	N	Unreleased	Test, Chairman	10/29/2020 01:00:18		
+ <input type="checkbox"/>			N	Unreleased	Test, Chairman	10/29/2020 01:00:18		
+ <input type="checkbox"/>			N	Unreleased	Test, Chairman	10/29/2020 01:00:18		
+ <input type="checkbox"/>			Y	Released	Hacker	11/02/2020 08:00:39	Unreleased	

- Badge release page has multiple filters to sort for individuals by title or subcommittee.
- There are also filters at the bottom where you can type the member number or the members name.
- Information regarding your committee's rules on holding badge without dues is listed at the top.
  - To update that requirement, email Membership.



# RELEASING/UNRELEASING BADGES

Member Number	Member Name	Dues Paid	Badge Status	Released By	Released Date	Other Committee Badge Release Status	Pickup Date
<input checked="" type="checkbox"/>		Y	Unreleased	Test, Chairman	10/29/2020 01:00:18		
<input checked="" type="checkbox"/>		Y	Unreleased	Test, Chairman	10/29/2020 01:00:18	Unreleased	
<input type="checkbox"/>		Y	Unreleased	Test, Chairman	10/29/2020 01:00:18	Unreleased	10/23/2020
<input type="checkbox"/>		Y	Unreleased	Test, Chairman	10/29/2020 01:00:18	Unreleased	
<input type="checkbox"/>		Y	Unreleased	Test, Chairman	10/29/2020 01:00:18	Unreleased	
<input checked="" type="checkbox"/>		Y	Unreleased	Test, Chairman	10/29/2020 01:00:18	Unreleased	
<input type="checkbox"/>		Y	Unreleased	Test, Chairman	10/29/2020 01:00:18	Unreleased	
<input type="checkbox"/>		Y	Unreleased	Test, Chairman	10/29/2020 01:00:18	Unreleased	
<input type="checkbox"/>		Y	Unreleased	Test, Chairman	10/29/2020 01:00:18	Unreleased	
<input type="checkbox"/>		Y	Unreleased	Test, Chairman	10/29/2020 01:00:18	Unreleased	
<input type="checkbox"/>		Y	Unreleased	Test, Chairman	10/29/2020 01:00:18	Released	
<input type="checkbox"/>		Y	Unreleased	Test, Chairman	10/29/2020 01:00:18	Unreleased	

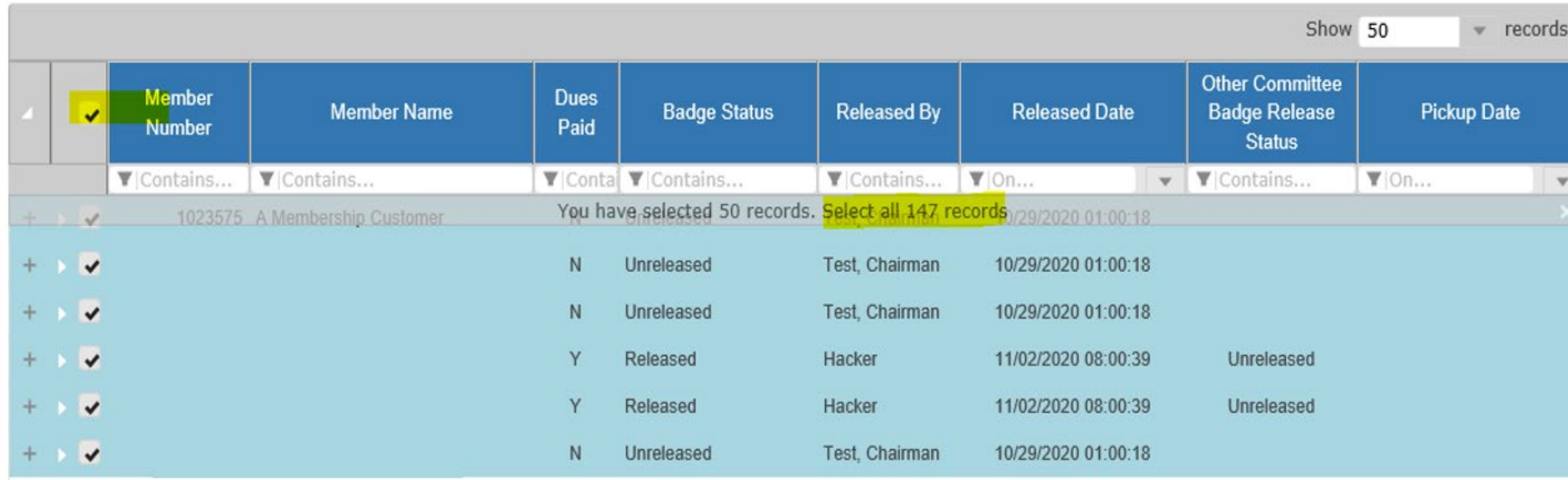
12 matching records

Release Selected Unrelease Selected Clear Selected

- To release or un-release badges, you will click in the box on the left-hand side of the member number and a check will appear, when you are ready to either release or un-release, you will click the orange button at the bottom of the page.
- If you want to clear what you have selected and start over, click the clear selected button.



# RELEASING BADGES IN BULK



	Member Number	Member Name	Dues Paid	Badge Status	Released By	Released Date	Other Committee Badge Release Status	Pickup Date
+ > <input checked="" type="checkbox"/> 1023575 A Membership Customer You have selected 50 records. <a href="#">Select all 147 records</a> 10/29/2020 01:00:18								
+ >	<input checked="" type="checkbox"/>		N	Unreleased	Test, Chairman	10/29/2020 01:00:18		
+ >	<input checked="" type="checkbox"/>		N	Unreleased	Test, Chairman	10/29/2020 01:00:18		
+ >	<input checked="" type="checkbox"/>		Y	Released	Hacker	11/02/2020 08:00:39	Unreleased	
+ >	<input checked="" type="checkbox"/>		Y	Released	Hacker	11/02/2020 08:00:39	Unreleased	
+ >	<input checked="" type="checkbox"/>		N	Unreleased	Test, Chairman	10/29/2020 01:00:18		

To release badges in bulk for your committee, **click in the checkbox** in the top grey header, it will auto check every record on that page. You will also see a small bar appear that mentions how many records you have selected for that page. If you want to select everyone regardless of who is on the page click the hyperlink **“Select All \_\_\_ Records.”** When you are ready, click release selected at the bottom of the page.



# COMMITTEE SERVICE HISTORY

- Previously this process was combined with the badge release screen.
  - The process is separate from releasing the badge.
- Anyone who has met all committee requirements, should receive credit for working that Show year.
- Be sure to give Committee Service history credit to yourself and your Officer.
- If you remove someone from your roster for not meeting requirements or not showing up to committee assignments, they should not receive service credit.



# COMMITTEE SERVICE HISTORY, CONT.

## Committee Service History

Committee: Membership

Title: --Select One-- Subcommittee: --Select One--

Find Clear Filter

Export

**Important Information:** The purpose of this page is for committee chairmen to determine which volunteers are eligible to receive committee service history for the 2021 show year. If you need to review which volunteers have met badging requirements (show dues paid, comm dues paid, indemnity, legal name, etc.) please go to the Report page and download a Full Roster report as well as any internal reports for additional required items. The Membership Office will contact committee chairmen and staff coordinators when this process is to be completed. This page is available for a limited time only. All service history selections must be input by 11:59pm on April 15th. This page will not be accessible after April 15th.

**Instructions:** To select that a volunteer is eligible for committee service history, click the box on the left next to the volunteer's member number. A check mark will appear in the box. Click "Save" at the bottom of the page when completed. Clicking the Select All box at the top of the page will select all records visible on that specific page. You must continue on to the subsequent pages to continue or update the count of visible records. To export this data, click the "Export" button near the top of the page. Committee service selections must be input by 11:59pm on April 15th.

	Member Number	Member Name	Comm Dues Paid	Show Dues Paid	Badge Status	Other Committee Badge Release Status	Service History Updated By	Service History Update Date
<input type="checkbox"/>	1023575	A Membership Customer	N	Y			Key, Rick	03/14/2021 10:04 AM
<input type="checkbox"/>			N	Y	Released			
<input type="checkbox"/>			Y	Y	Released	Unreleased		
<input type="checkbox"/>			Y	Y	Released			
<input type="checkbox"/>			N	N	Unreleased			
<input type="checkbox"/>			Y	Y		Released		
<input type="checkbox"/>			Y	Y		Released		

- Click the box on the left next to the volunteer's member number. A check mark will appear in the box.
- Click "Save" at the bottom of the page when completed.
- Clicking the Select All box at the top of the page will select all records visible on that specific page.
  - You must continue to the subsequent pages to continue or update the count of visible records.
  - To export this data, click the "Export" button near the top of the page.




# DELETE MEMBER PHOTO

## Delete Member Photo

**Committee:**

**Member #:**

**Member Name:** Llama, Larry

**Member Photo:** 

You receive an email when photos are posted by your committee members. The email will include the photo as well as the volunteer name and member number.

If the photo is inappropriate for identification/Show purposes, go to Chairman Tools and delete the photo. Enter the member number; click **Find**; click **Delete**.

You will need to notify the member that they should post an alternate photo.



# COMMITTEE PERMISSIONS

**2021 Membership Permissions**

**Committee:**

- **Designee** – this allows the volunteer **full access** to all Chairman Tools except for the Permissions page. This individual will be able to see all data, perform all actions (except approvals) and download all reports.
- **Beverage Requestor** – this allows the volunteer access to order beverages on behalf of the committee during Show.
- **Budget Lookup** – this allows the volunteer access to the Report page under Chairman Tools for the committee and allows access to download Budget reports.
- **Communication Coordinator** – this allows the volunteer access to the Committee Communication page under Chairman Tools for the committee and allows ability to add a Home Page Post and send Bulk Emails.
- **Equipment Requestor** – this allows the volunteer access to the Equipment Request page.
- **Meeting Requestor** – this allows the volunteer view only access to the Meeting Request page under Chairman Tools for the committee.
- **Roster Requestor** – this allows the volunteer access to all roster related pages: Reports, Request Tracking, Roster Request, Hierarchy Request, Subcommittee Manager, Volunteer Request List, and Badge Release.
- **Sales Coordinator** – this allows the volunteer access to the Reports page under Chairman Tools for the committee and allows access to download the Sales History report.

Action	Role	Customer #	Customer Name	Title	Effective Date	Comments
Delete	Budget Lookup			Chairman	05/01/2020	
Delete	Communication Coordinator			Chairman	05/01/2020	
Delete	Roster Requestor			Chairman	05/01/2020	

- Chairmen have sole access to this table and they receive their authority through their title on the roster. They do not need to be listed in this table.
- The “Designee” can see and do anything a chairman can, with the exception of this table. Do not select this option if you want to limit access.
- Chairmen may assign multiple responsibilities to one individual without giving them full access.
- Chairmen need to review and update this table whenever there are committee leadership changes.





# COMMITTEE PERMISSIONS, CONT.

Action	Role	Customer #	Customer Name	Title	Effective Date	Comments
Delete	Budget Lookup	[Redacted]	[Redacted]	Chairman	05/01/2020	
Delete	Communication Coordinator			Chairman	05/01/2020	
Delete	Roster Requestor			Chairman	05/01/2020	
Delete	Roster Requestor			Vice Chairman	05/01/2020	
Delete	Sales Coordinator			Vice Chairman	05/01/2020	
Delete	Sales Coordinator			Vice Chairman	05/01/2020	
Delete	Sales Coordinator			Chairman	05/01/2020	
	-- Select One --					

**Add**

**Save**

- Click “**Delete**” in the left column to delete a roll.
- To add someone to the Permission Table, select a role from the drop down then enter their member number on the bottom line and click “**Add**”. Then click “**Save**”.



# SHIFTBOARD

## Chairman Tools - Shiftboard

### 1. What is Shiftboard?

- a. Shiftboard is the real-time online scheduling application used by approximately 24,000 committee volunteers.
- b. [Shiftboard FAQs](#)

### 2. Where can I get more info before deciding to use Shiftboard?

- a. [Shiftboard Home Page](#) - general information
- b. Level 1 Training Video (under construction)

### 3. I want to join- what do I do next?

- a. Send a request to [shiftboard@rodeohouston.com](mailto:shiftboard@rodeohouston.com) along with the names of your scheduling coordinator(s). Once your committee is added to Shiftboard an Information Services Committee (ISC) Shiftboard focal will be assigned to work directly with your committee.
- b. Attend the Level 1 and 2 Training Sessions as well as work with your assigned ISC Shiftboard focal to get your committee schedule built.

### 4. Already using Shiftboard - How do I...

- a. [HLSR Shiftboard Help \(FAQs\)](#)
- b. [General Shiftboard Training Videos](#)
- c. [Printable Training Guides](#)
- d. Contact the ISC Shiftboard Support Team at [shiftboard@rodeohouston.com](mailto:shiftboard@rodeohouston.com)

- Shiftboard is supported by the Information Services Committee and they will offer training sessions for chairmen and designees.
- Links on this page take you to Shiftboard sites that may help you.
- Email [Shiftboard@rodeohouston.com](mailto:Shiftboard@rodeohouston.com) with any questions.



# QUESTIONS AND REQUESTS

## Membership Department

- Katie Luckett (ext. 1194)
  - [luckett@rodeohouston.com](mailto:luckett@rodeohouston.com)
- Avery Cooper (ext. 1079)
  - [cooper@rodeohouston.com](mailto:cooper@rodeohouston.com)
- Sandra Rodríguez (ext. 1010)
  - [rodriguez@rodeohouston.com](mailto:rodriguez@rodeohouston.com)

## Any available person

- [membership@rodeohouston.com](mailto:membership@rodeohouston.com)
- 832-667-1073





**LET'S  
RODEO**

**FEB. 27 – MARCH 17, 2024**

[rodeohouston.com](http://rodeohouston.com)

