

NAWG Membership Data Improvements

By Kevin Machin. Created Tue-10-Mar-2025.

There's a very strong need to improve the way we store and manage the membership data. The current technologies and working practices are not serving us well, which leads to frustration, lost information, bad management of our members.

This document sets out to address the problems and, hopefully, come up with ways to improve things.

Current Methods

The current methods we use to store and manage our membership data have been with us for many years. During this time, they seem to have devolved, rather than evolved. This has resulted in the situation we now face, and the need for this project.

Current Technology

The technologies we currently use for membership data are:

- **Excel workbook:** using Microsoft Excel, or compatible software such as [LibreOffice](#), to maintain a workbook; a collection of related spreadsheets in a single file. The file is encrypted for security purposes, so opening the workbook requires a password to be entered.
- **Dropbox:** there's a [Dropbox](#) shared folder, where the centralised membership data are stored. Access to this folder is restricted to committee members.

Current Practise

The current practise is ad-hoc; people often go in and make changes to the data:

- Without informing anyone else,
- (Probably unknowingly) while someone else is working on the data.

This has led to problems with concurrent edits being made to the data, and *may* be the reason for apparent loss of data changes. Please see [issue 356851](#) for an explanation of this.

Issues with Current Methods

- The Dropbox centralised workbook should be deemed as the *single source of truth*, i.e. the point from which we all start any work on the data. However, this is not always adhered to, leading to data loss as a result of concurrent edits.
- The workbook is in a terrible state. Data integrity is poor and is often badly out of date.
- The password for the workbook has not changed for decades. This increases the risk of a data breach, accidental or otherwise.
- There are design issues. Some things are handled poorly or not at all. For example:
 - A person can be a member of and/or contact for, more than one writing group.
 - A person can: be a *patron, supporter, individual member, group contact/member, receive Link magazine, receive the newsletter*. Some of these are treated as being mutually exclusive, but this is not the reality.

There's another important issue that's hindering NAWG's operations. It might be out of the scope of this project, since a solution would require more than our own technology and procedures; cooperation from our group contacts, as a minimum. The issue is that ***we don't know who our groups' members are*** other than the group contacts and in cases where group members are also individual/student members or subscribers to our regular publications.

Interim Improvements

The way we store and manage membership data needs a serious rethink and, in all likelihood, a redesign and reimplementation. This is obviously disruptive and is, as yet, not properly envisaged and planned.

In the mean time there are things we can do to improve the situation without too much disruption.

Improved Practise

In the Dropbox shared folder, there's now a `_readme.docx` file that lays out some procedures and tips for improved working practise. This is not a perfect solution but, if we all follow it, should greatly reduce the risk of data changes being lost.

To briefly summarise:

- It suggests we use a "signal" file to indicate when someone is working on the data. No other person should attempt to do so while a signal file exists in the Dropbox folder.
- Always work on a local copy of the workbook; not directly on the Dropbox file.
- Take care that the right data goes into the right cells in the workbook.
- Use a consistent file naming convention, so they sort into date order and the latest one is obvious (the previous ones serve as emergency backups).
- Maintain a change log document, to record who made what changes and when.

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Workbook Cleanup

We're cleaning up the data in the workbook. This is a manual process and is being coordinated between myself and Vanessa.

Work Done

- Removed an unnecessary duplicate "type" column from the main sheet.
- All columns in the main sheet that required dates, now have proper dates in them, rather than assorted text attempting to represent dates.
- Assorted minor corrections. Full details are in the changes log in the Dropbox folder.

Work for Discussion & Planning

The following are ideas that could potentially be applied, though have not yet been agreed upon.

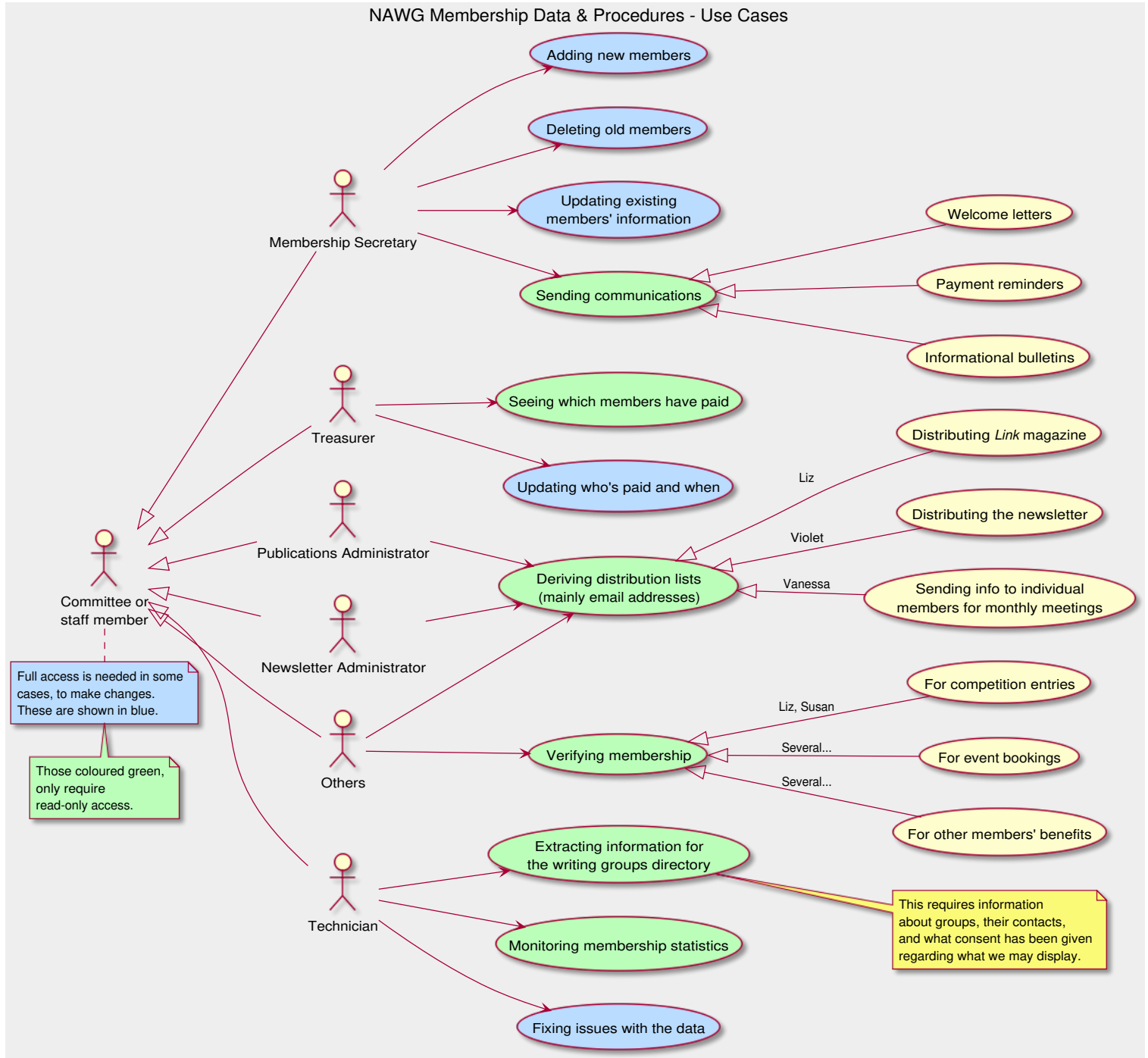
- The "cheques" sheet has no entries after November 2020. If this sheet is no longer in use then it should be removed.
- Have separate sheets for *people* and for *groups*, in order to reduce the amount of duplication. These would be cross-referenced using proper lookup formulae, rather than relying on manual copying.
- Replace the "type" column with several columns (some of which already exist) to handle persons' attributes that are not mutually exclusive, e.g. a person can be *individual*, *patron* and *group contact*.
- Introduce a "status" column that indicates whether a member has paid, is removed, etc. The paid/unpaid could be automatically derived from the "last paid" data.
- Consolidate the two "removed" sheets into one. Or possibly into the main sheet with a status of "removed".
- Integrate the data necessary for the *writing groups directory* (mainly consent indicators) into the main sheet, removing the necessity for having a separate sheet and therefore the need for manual copying.

Requirements

The interim improvements can and are being done straight away, but before any bigger, longer term improvements can be made, it's important to fully understand what the membership data, technology, and procedures need to provide for NAWG as a whole. This section attempts to address those requirements.

Use Cases

The following diagram lists the use cases known to me at the time of writing. Please let me know if anything is missing or incorrect.



Functional Requirements

Here are some functional requirements for any new technology and procedures we might put in place.

- The data and associated systems and procedures, must assist NAWG in their endeavours. If it hinders us, then we've got it wrong.
- The data must be protected against unauthorised access, theft, misuse, tampering, or other malicious activities.
- The ability to roll back to a previous set of data, in case mistakes are made, or a disaster occurs.
- Two or more people making concurrent edits must not be possible. Sets of changes must be serialised.

Possible Technical Solutions

Here are some possible technical solutions for storing and managing our membership data.

Technology	Description	Pros	Cons	Probable Timescale	Notes
Dropbox, Excel.	Keeping what we've got.	Minimal disruption.	Bad fit for requirements. High risk of data issues. Requires a certain level of competence with spreadsheets.	Short.	We can improve procedures on top of this, to reduce/mitigate some of the problems.

Technology	Description	Pros	Cons	Probable Timescale	Notes
Dropbox, Excel (redesigned).	Same tech. stack, but restructured workbook.	Improved data integrity. Reduced or eliminated need for manual copying between rows/columns/sheets.	Solves only a sub-set of the problems.	Medium.	Details unclear at this stage. New design will need thinking caps.
Database, web access.	Based on proper relational database.	Data are a closer fit to reality. Superior security and access control. Can be made user-friendly.	Technically more complex to implement.	Long.	I have expertise in this area, but this would only be required during development. Once up and running, membership data management could be done by non-technical people.
Hosted solution.	Outsource the system to a third party.	Less to worry about, possibly.	Costs money. Risks outside our control.	Unknown.	Needs research.