**Discussions on membership with Becky:**

7/7/2016

1)      All members create a login registration. Registration will include a user name (their email address) and a password.

--> I like the idea of a member having a login registration but maybe use their first&last name - my login would be BeckyDenevan.  Some people (Neil and Molly Mitchelfelder) don't have emails.

a.      This way when a person renews, we always know who the person is.

--> This is another reason to have the login name be the FirstLast name because it's not always easy to know who the person is by their email address ... some people have some pretty creative email addresses.

2)      Do you think it matters if we don’t have a calendar year renewal? What if the persons membership was for the 1 year after they paid?

a.      Then we would no longer have ½ year memberships

b.      For people that pay by check, then handling that work would be spread around all year. Would that be more hassle?

c.       We can send out automatic emails when a person  membership is lapsing.

d.      That would mean we would not have the “membership drive” at the end of the year – for the next year.

--> At first glance, I really like this idea but it is a radically different approach.  I think we need to think about it more and talk to the Board about it.  I like and agree with all the points you've made above but ....  it'd be good to get more opinions on this one.

3)      To renew ones membership, they would login and go thru a membership renewal (or new membership) form. At the end of that the user would be put into Paypal for their payment.

a.      We could keep track if a person didn’t actually pay in paypal and automatically email them to tell them the renewal didn’t complete. They would not have a renewal until payment is done either via PayPal or check.

b.      A person could submit a paper entry if needed and pay by check but it would have to be manually entered by the membership person. A pain! How many people do this? What if we said everyone has to at least register online – and mail in check later?

-->  I think we'll need accept the idea that some memberships will have to be done manually by the membership person.  I do like that everyone fills out the form online - even those who opt to pay by check - because people's hand writing is just sometimes really hard to read.

4)      The membership process would be completely automatic. I.e. the membership person would only get reports of error cases or special cases. For every other renewal no work is needed.

a.      There would be an online list of “waiting for checks” with the persons login name. When check arrives there would be a tool, that you start (a webpage). You enter the login name & indicate that check was received and you’re done.

b.      Online renewal would force the person to enter all information – i.e. additional family members if family membership.

c.       The additional adult with a family membership would have their own login. If they split a family membership, they can continue with an individual membership if they desire. An error would appear to the user if they try to create both accidentally and would not allow them to continue (or something similar – this needs a little more thought).

d.      All renewals would automatically send an email to the user – either congrats with members info, or notice to send in check for payment or error on member info. In the last case the user would be able to login and change his/her profile and redo the renewal process.

e.      If a person tried to submit a second membership renewal they would be notified they have already paid.

f.        What other error conditions are you aware that need to be monitored?

-->  Yahoo - I love the idea of only getting reports of error/special cases.  Well, maybe also a report at the end of a day when memberships have been entered to detail the number of new and renewed memberships and also for the number of new/renewed members.  This way the membership person can be on top of what's happening with the memberships - both the problems and the successful completions.

5)      I will create tools to monitor/manage the user database

a.      Ability to mark user as paid renewal

b.      Delete/add members – to fix errors or add mail-in membership entries

c.       Correct user profile

d.      Create reports of members – include status, how paid, families versus individuals, etc.

-->  YES!  Maybe this is all we need instead of the point I make above.

Any other suggestions on the renewal process?

-->  I'll keep thinking ...   When I go into the membership database to enter new/renewed members, my blood pressure shoots up so I'll probably come up with more changes I'd like to see.  Now that someone is listening to me, I am excited about what can be done!  Thanks Bob.

Sorry this has taken a little longer than I wanted to get to this point. But hopefully I can pick up speed from here.

-->  You're responding at lightening speed, comparatively speaking!

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1)      Regarding the year-end renewal issue: Have you been asked by the insurance group as to whether someone was a member? And was your yes/no answer sufficient or did they require some type of documentation to validate it?

--> A simple yes/no was all that the insurance required (at least at this point).

a.      I was thinking that I could log each years renewal along with a check number/paypal number & date. That would at least provide more authentication that this person is/was a member.

b.      That would allow me to keep track of every year the person is a member.

--> OK, this sounds good.

2)      Email address as login:

a.      The best part of this is that email addresses are unique so it makes it very simple. Plus it’s relatively simple for most people to remember, rather than making up something like RobertMiller756.

b.      Even though email addresses could be weird, all reports will have both the email address and person’s name. So there will be no confusion or guessing. We can sort out what is most usable (addresses also? There are all kinds of options).

c.       The problem I am trying to stay clear from is what I had in the ACTC bike club. There were two Robert Millers and it took me three years to get them to fix it so I didn’t get the other guys emails/renewals requests.

d.      But we do have to resolve folks like Neil and Molly, or anyone else who mails in their membership.

--> OK, using email addresses sounds good.  Maybe we could make up one for Molly & Neil (and others with no email) or let them make up something.

3)      I could go either way with the calendar year renewal. Having it be any date makes a few things easier in the software.

--> Sounds good to me.

4)      Reports – there are a lots of possibilities – daily or otherwise.

a.      For example, there will be a report of member applications, but waiting for check. The membership will be on hold until you enter check received for that person.

--> Reports are a good thing but reports just for the sake of reporting is not what we want.  I'll think about this.

5)      One other area I didn’t mention that may be tricky and require some thinking is “breakup” or “merge” of family memberships.

a.      I think what it means is that both adults in the family will have logins as part of their family account. So we will have a history of each adult individually. Maybe something like 2014-Family, 2015-Family, 2016-individual, if they split in late 2015.

b.      I think we can leave the minors out of it.

-->  We get people who sign up as a 'family' to save money.  This kind of family usually only lasts a year - like multiple cinderella trainees signing up together.  There are not many examples of 'merging' individuals into a family but there are plenty of examples of family memberships becoming just an individual membership.  However this is done in the future will be easier than it is currently I'm sure.

  **Memberships can only be active in one year.**  A membership can only be active in one year - a member is either a 2015 member or a 2016 member.- I have to wait until 2016 before I update memberships to the new year.

**Impact:**What this means is that literally hundreds of membership emails build up as a backlog in email.  The amount of time - and these all have to be done ASAP in the new year - is huge.  FFBC has a contest where the people who enroll between 11/20 - 12/20, will be entered in a drawing.  This means that I have to do all the steps to verify a membership (but don't enter/update the membership data), keep track of these members for the drawing, and then when the 'contest' is over, go back and enter the data in the database  There were 169 early members this year - the contest alone probably cost me an additional 3 - 5 hours.

**Suggested Fix:**  Would like ability to have simultaneous membership for the current year and the next year.

  **Membership enrollments need to be verified in PayPal.**For every membership notification I get from the online enrollment, I need to verify payment in PayPal.

**Impact:**When I find the record in PayPal, I verify that the correct amount (individual vs family) was paid.  However, sometimes the name on the enrollment form does not match the name in PayPal (this might happen 20% of the time).  When a member name is not in PayPal, I need to do a transaction search to find member name as it is buried within the details of the record.  This happens when the name on the credit card is different that the member's name.  Each time, this adds a couple of minutes to the task of updating membership.

**Suggested Fix:**An indicator could display on the membership notification to show that a record was processed in PayPal for the membership.

  **Not all payments done through PayPal.**Some people enroll via the online form but don't use PayPal for the payment.  For these, I need to flag these membership forms and wait for the treasurer to let me know when she receives the payment. At that time, I can continue to process the membership.

**Impact:**  First the process to verify membership in PayPal is done to determine that no record is there (occurs maybe 5 - 10% of records).  These enrollments must be flagged.  I wait to hear from the treasurer and, if the treasurer has not received payment within a week, then I email the member to follow-up on payment.  This is hugely time-consuming - happens about 3 - 5% of total membership.

**Suggested Fix:**  The online membership form could capture whether the member plans to pay via paypal or to send money to the treasurer and this information could display on the notification to membership.

  **Some Family memberships not complete.**Some enrollments are for a family but the family members are not listed - only the person paying is listed.  It is important that all members in a family membership are listed on the online form because this is the implied signature which is a requirement for membership.

**Impact:**For these, I need to send an email and explain that the membership needs to be submitted showing all the names in the family membership.  (I have this problem with the paper forms too where a family membership does not have signatures for all the members and I need to contact these people to get signatures.)  When the member complies and sends back the additional information, I need to go back into the record and again update the data. This occurred 3 or 4 times with the 215 memberships I've done so far this year - it probably cost me about 10 minutes extra per person.

**Suggested Fix:**  When a member enters a family membership, check that at least one additional member name has been supplied.

  **Dropped members require a new membership.**  When a member is dropped from a membership, a new membership must be created. If a member(s) is dropped from a family membership, the membership shell must be recreated and then an email is sent to Mark who moves the the member(s) as appropriate in order to maintain the history of the member(s).

**Impact:**  The additional work of creating the membership shell and then writing the email to move members around is error-prone and takes a couple of minutes per occurrence (happens over 5% of the records).  (I know I've cost you extra time when I've done it wrong.)

**Suggested Fix:**  Create an indicator that will identify active members in a membership.  Members who are no longer in a 'family' can show as inactive.  Allow the membership person to set this flag.

  **Run job to send email to member.**Once a member has rewed (or a new member has joined), The member's name, email address, membership ID and member number is added to a grid in Google docs and a job is run which sends the welcome email with the member's membership card to the member's email address.

**Impact:**  With the initial input of the membership records, Mark runs the job that creates the grid of member's who are sent the welcome letter + membership card.  After this initial load, all new memberships are added to the grid - member name, email, membership ID, member ID - must be manually entered into the grid and the job run to send out the additional emails.  Close to half of the members are automatically taken care of with the initial load but there is an addition 250+ members throughout the year who need to be added manually - at least 30 sec per record.

**Suggested Fix:**  Automatically generate the welcome letter + membership card email when a member record is committed to the database.

  **Double payment issues.**  Some people forget that they've paid and they submit a membership form with another payment using PayPal.

**Impact:**When this happens, an email must be sent to the member with a copy to the treasurer and then the treasurer refunds the membership (over)payment.  This creates more work for membership and for the treasurer.  This has happened 3 or 4 times already with 2016 memberships.

**Suggested Fix:**  If a membership has already been paid, the system should not allow the member to submit another payment for the same membership.

  **Online membership form problem - duplicate records:**Sometimes, a membership form is duplicated several times:  in a string of email records, I may have member A, then B, then C, then C, then C, then member D.  I can't determine a pattern of why/when this happens but it happens frequently.

**Impact:**  It is more of an annoyance than anything else, I just delete the duplicate(s).

**Suggested fix:**  Fix the bug.

  **Online membership form problem - data overlay:**  Lately there has been a problem where the member's email has overlayed the street address.  this problem has happened 3 times in the past 200+ records.

**Impact:**When this occurs (it's happened 3 or 4 times), if the member already has a record on the database I compare the data that has not been overlayed - name, email, zip code - and if that's the same then I just assume the overlayed data is not new and I renew the record.  If the person is a new member then I have to send an email to the member and get the accurate information so that I can update the database.

**Suggested fix:**  Fix the bug