

DONOR ENGAGEMENT

Configuring Membership Effectively in EveryAction



Meet your Trainer...

Ryan Sauve

Training Specialist

Donor Engagement

EveryAction



Agenda

1. Membership Management Setup
2. Managing Established Membership



Membership Management Setup

Configuring Membership Types

Before **Membership** can be launched in EveryAction, first it is necessary to define what benefits, levels, and names the program will carry.

FUNDRAISING
Membership Management Actions (500 only) ▾

● EDITING

Levels Benefits Customize universal membership settings

You haven't set up any membership levels yet

Start automatically assigning memberships to your supporters based on their contributions

Before you get started, it's a good idea to have a plan for your membership structure: what levels are included in your membership program, how supporters will qualify for each level, and what benefits each level offers. [Learn more](#)

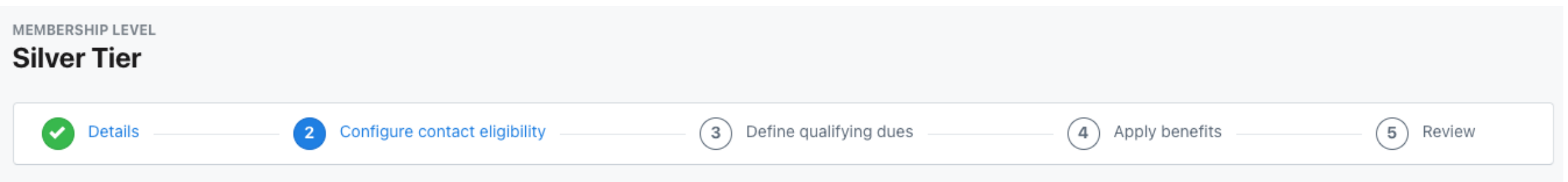
[Add a membership level](#)

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Membership Workflow - Eligibility

Membership setup contains a workflow like that seen in Online Actions creation, where we must indicate:

- **Member Type:** will this membership be offered to just individuals, organizations, both, or families?
- **Attributions and soft credits:** are contributions given by those *other* than a main contact eligible for membership inclusion?
- **Universal membership settings:** will contacts be excluded based on Activist Codes or Contact Preferences?
- **Member name & salutation:** how should members be addressed in communications or membership outreach?



Membership Workflow – Qualifying Dues

For Qualifying Dues, we can automate inclusion in a membership program based on:

- **Contributions made to specific Campaigns or Source Codes:** this can also be set to *exclude* certain items as well if your organization mainly runs on membership.

Additionally, we can define:

- **If Contributions are eligible based on one time or recurring giving, and at what amount.**
- **How your expiration periods are set:** specifically, are your memberships based on a set length or on a yearly basis.
- **Renewal settings:** these are globally set for all levels of membership (if applicable), but we can determine if renewal periods are based on rolling dates, or if expiration should be applied to-date, or to the beginning or end of a month.



3 Define qualifying dues

Membership Workflow – Benefits

Does your organization supply members with exclusive benefits? For example, does being a member:

- Provide a discount to accessing your facilities?
- Give free entry to your historical/arts/music location?
- Allow sharing of membership to other contacts?

We can then also state whether this membership level includes a card for those that qualify, and how many are provisioned per membership.

Benefits
Select which benefits you offer with this membership level.

Select benefits

Membership cards
Provide membership cards to contacts who qualify for this level.

Do you provide membership cards for this level?

Yes

No

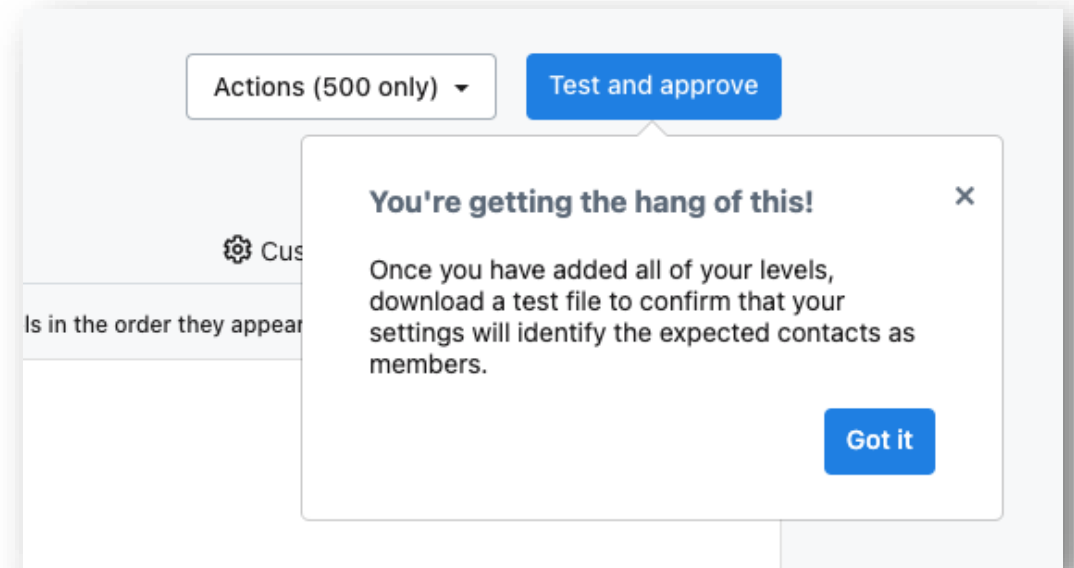
Viewing benefits from the contact record
Benefits are displayed on each member's contact record.

If you provide membership cards to members, you can indicate on the member's contact record when cards have been sent.

Membership Workflow – Testing and Approval

Once we've set all details about membership for the organization completely, which should include all *current* levels, we can then move on to **launching** the program.

By clicking the option to **Test and Approve**, EveryAction will generate a test file containing data for any membership-eligible contacts from the last 15 months and sends this to **My Export Files**. This does not fully finalize the launch, but allows you to see if any settings need to be tweaked further.



Membership Workflow - Reviewing your test file

Ideally, when setting your membership levels, it would be best to keep in mind specific contacts that should be included in each tier.

This way, when confirming your output file, you can easily identify that your setup matches the returned results.

Once that file is reviewed, if anything seems amiss with your expectations of the output, you may **Edit** your current membership settings to tighten/loosen them as you see fit.

12	1.12E+08	Robertson, Destiny	Destiny Robertson	Silver Tier	Single	9/25/24	9/30/25	11580031
13	1.12E+08	Gupton, Akhsay	Akhsay Gupton	Silver Tier	Single	5/22/24	5/31/25	11554627
14	1.12E+08	Burks-Craig, Jarnell	Jarnell Burks-Craig	Silver Tier	Single	9/25/24	9/30/25	11580028
15	1.12E+08	Leprell, Keisa	Keisa Leprell	Silver Tier	Single	4/12/24	4/30/25	11554625
16	1.12E+08	Watson, Joy	Joy Watson	Silver Tier	Single	9/25/24	9/30/25	11580024
17	1.12E+08	North, Shakeema	Shakeema North	Silver Tier	Single	9/25/24	9/30/25	11580022
18	1.12E+08	Bain, Raymone	Raymone Bain	Silver Tier	Single	9/25/24	9/30/25	11580021
19	1.12E+08	Gardes, Jean-Charles	Jean-Charles Gardes	Silver Tier	Single	9/25/24	9/30/25	11580017
20	1.12E+08	Taylor, Tandra	Tandra Taylor	Silver Tier	Single	9/25/24	9/30/25	11580016
21	1.12E+08	Rhone, Carlette	Carlette Rhone	Silver Tier	Single	9/25/24	9/30/25	11580013
22	1.12E+08	Brown-Spencer, Bonita	Bonita Brown-Spencer	Silver Tier	Single	9/25/24	9/30/25	11580012
23	1.12E+08	Amaning, Akua	Akua Amaning	Silver Tier	Single	9/25/24	9/30/25	11580101
24	1.12E+08	S, K	K S	Silver Tier	Single	9/25/24	9/30/25	11580096

If the file appears sound, however, you can simply choose to **Approve** your settings, which will run overnight and begin adding contacts into your membership program.

Managing Established Membership

On the Contact Record

Once a contact has been enrolled in Membership, the data associated with their enrollment can be altered directly from their individual or organizational record.

Please note that membership can only be edited in this way from the **Contact Record View**, this is not available within the **All Details** view.

From the right panel, we can view details of the contact's membership, including if they've renewed, what benefits they have, their full history, an audit trail for changes to their enrollment, and more.

Additionally, we can alter:

- The member's level.
- What payment should reflect their membership.
- Inclusions and exclusions to membership automation functions.
- If the membership should be canceled.

The screenshot shows a 'Membership' details panel with a close button (X) in the top right corner. The panel is divided into several sections:

- Membership**: A header section.
- Current membership**: A sub-section with an edit icon (pencil) in the top right. It contains a table of details:

Member name	Dan Mathias	Member level	Silver Tier
Expiration date	March 25, 2025	Level type	Single
Dues paid	<u>\$400.00</u>	Enrollment type	New
Change	No Change	Benefits	—
Send renewals?	Yes	Exclude from membership process?	No
- Membership cards**: A section stating 'Cards have not been sent'.
- Membership summary**: A section with a date 'Mar 25, 2024' on the right. It includes:

Member since	Mar 25, 2024
Times renewed	0
Last renewed	—
Total amount	<u>\$400</u>
- Membership history**: A section with a 'View report' link on the right. It contains a summary box:

Silver Tier	Dues paid: <u>\$400.00</u>	...
● ACTIVE	Enrollment: New	
ID: 371166	Change: No Change	
Joined on March 25, 2024 • Expiration date: March 25, 2025		

Through Create A List

Create A List allows for searches based on Membership details, making enrollment, renewals or alterations quick and easy.

Once we've determined the Level, Level Type, Dates, or any other particulars about members, we can then use **Bulk Apply** to new Membership details to existing folks, or to enroll new contacts into a Membership Level if they've joined through check payment or another enrollment fashion.

The screenshot displays the 'Membership' search interface with the following fields:

- Most Recent Membership Only
- Level: Silver Tier - ID: 460
- Level Type: Family
- Join Date: --Select a Date Range Type--
- Expiration Date: --Select a Date Range Type--
- Member Status: Active
- Enrollment Type: [Empty]
- Change: [Empty]
- Dues Paid: 0.00 to [Empty]
- Dues Paid via: [Empty]
- Dues Attribution Type: [Empty]
- Member Since: --Sele
- First Membership Source Code: [Empty]

The 'Apply Memberships' modal is open, showing the following configuration options:

- Membership Level: Apply One Value to All Records [Empty]
- Join Date: Apply One Value to All Records mm/dd/yyyy
- Expiration Date: Apply One Value to All Records mm/dd/yyyy
- Include in renewals?: Apply One Value to All Records Yes
- Exclude from nightly process?: Apply One Value to All Records No
- Membership cards sent?: Apply One Value to All Records [Empty]
- Cards Sent on Date: Apply One Value to All Records mm/dd/yyyy

With Bulk Upload





As with other data Bulk Uploaded to EveryAction, we can either include columns in our spreadsheet that would correlate to the specific data needed to enroll a contact in Membership, or this can be added after-the-fact.

If Membership data is included in your upload file, it would require, at minimum, to include columns for:

- Membership Level
- Join Date
- Expiration Date

Contribution data may also be included with your uploaded file and can be linked as the **Dues Paid** to the membership as well.

Apply Memberships

Membership Level *	<input checked="" type="radio"/> Apply One Value to All Records	<input type="text"/>
	<input type="radio"/> Choose Column from Data File	<input type="text"/>
Join Date *	<input checked="" type="radio"/> Apply One Value to All Records	mm/dd/yyyy 
	<input type="radio"/> Choose Column from Data File	<input type="text"/>
Expiration Date *	<input checked="" type="radio"/> Apply One Value to All Records	mm/dd/yyyy 
	<input type="radio"/> Choose Column from Data File	<input type="text"/>
Dues paid by Contribution	Choose Column from Data File	<input type="text"/>
Dues paid by Pledge	Choose Column from Data File	<input type="text"/>
Dues paid by Recurring Commitment	Choose Column from Data File	<input type="text"/>
Include in renewals?	<input checked="" type="radio"/> Apply One Value to All Records	Yes 
	<input type="radio"/> Choose Column from Data File	<input type="text"/>
Exclude from nightly process?	<input checked="" type="radio"/> Apply One Value to All Records	No 
		<input type="text"/>

[Next](#)

Membership Reporting

Membership Report

[Home](#) / [Membership Report](#)

Membership Report

View membership details including dues, levels, status and statistics.

Export As... ▾

Report Actions ▾

Applied Filters [Edit Filters](#)

Contact Records: All Contacts

Member Status: Active, Lapsed ✕

Report Summary

Number of Memberships
21

Number of Active Memberships
21

Number of Lapsed Memberships
0

Number of Renewed Memberships
0

Number of Upgraded Memberships
0

Total Dues Received
\$7.80K
paid by attributed dues

Average Dues Amount
\$371

Group By ▾

[Edit Columns](#)

VANID	Membership ID	Member Name	Membership Level	Renew Date	Expiration Date	Enrollment Type	Change	Member Status	Dues Paid	Dues Paid via	Member Since
112389315	371167	[Unknown]	Silver Tier	3/25/24	3/25/25	New	No Change	Active	\$335.00	Contributions	3/25/24
112389282	371161	[Unknown]	Silver Tier	3/25/24	3/25/25	New	No Change	Active	\$353.00	Contributions	3/25/24
112389283	371162	Banner, Bruce	Silver Tier	3/25/24	3/25/25	New	No Change	Active	\$364.00	Contributions	3/25/24

Best Practices for Membership

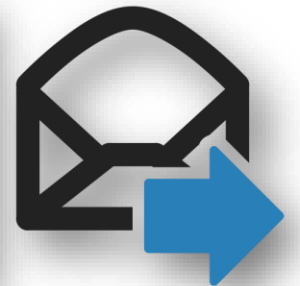
Automation and Membership

As Memberships and Renewals in particular can be a largely manual process to manage, using Create A List **Saved Searches** and **Automation** in tandem can ease the communication process for upcoming expirations or renewal notices.

Configuring Searches to contain data showing Expiration in the Range of 60 to 90 days from now, as shown, can then be linked to an email series to notify folks to renew without the need to keep an ever-present eye on the process!

The screenshot shows a configuration panel for a 'Membership' search. At the top, there is a dropdown menu for 'Membership' and a star icon. Below this, there is a checkbox labeled 'Most Recent Membership Only'. The main configuration area includes several fields: 'Level' (a dropdown menu), 'Level Type' (a dropdown menu), 'Join Date' (a dropdown menu with the text '--Select a Date Range Type--'), and 'Expiration Date' (a dropdown menu with the text 'In the range of'). Below the 'Expiration Date' field, there is a 'Custom' dropdown menu. Further down, there are two date range selectors: '60 Days From Now' and '90 Days From Now', with a 'to' separator between them. At the bottom, there is a 'Member Status' dropdown menu with a help icon.

The graphic is titled 'Automation' under the heading 'ENGAGEMENT'. It contains the text 'Automate workflows for your repetitive tasks and communication and leverage data into action. [Learn more about Automation](#)'. Below this, there are two options: 'Build from a template' with an icon of a box and a flowchart, and 'Start from scratch' with an icon of a blank slate and a flowchart. The text for 'Build from a template' is 'Out-of-the-box templates are a great starting point for common workflows'. The text for 'Start from scratch' is 'Start with a blank slate to create a custom workflow'. The word 'or' is placed between the two options.



Additional Resources

Support

- Contact your System Administrator
- Email help@EveryAction.com
- Call (202) 370-8050
- Submit a Support Request Ticket from the Main Menu of the EveryAction CRM



Help Center Resources

- [Fundamentals: Membership Management](#)
- [How to Manage Membership Records](#)
- [Feature Webinar: Setting Up Membership in EveryAction](#)



Additional Training

- Bonterra Academy: [Bonterra Academy Self Signup](#)
 - Foundational Webinar Series
 - Upcoming initiatives
 - Videos in Bonterra Academy



Thank You for Attending!

