Get Your Membership Mojo

Modeling your membership program in CiviCRM

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About Ginkgo Street Labs

- Based in Washington, DC
- Founded in 2009
- Actively participates in CiviCRM community
- Works closely with CiviCRM LLC core team
- Committed to Open Source software principles and methods
About Ginkgo Street Labs

CiviCRM Implementation and Consulting
We help you define your needs, organize your data and work with you on a successful implementation.

CiviCRM Custom Development
We can tailor CiviCRM for your specific needs and integrate with other systems.

CiviCRM Maintenance and Support
We will manage your CRM and CMS, and provide assistance and troubleshooting when needed.

CiviVolunteer
Ginkgo Street Labs leads the development of CiviCRM’s volunteer management extension.

Mobile Application Development
Today, we’ll cover...

- Basic concepts for Memberships in CiviCRM.
- Getting to know the interfaces.
- Understand the options before you start configuring.
When to use a Membership?

- For a Membership Program
- For a committee or team
- To track when people start and end participation
- When fees are required to join
- When you want to easily differentiate members and non-members
When Not to use Memberships

- If it applies to everyone automatically
- If there are no benefits to membership
- If it never expires
- If it could be better represented as a relationship or group
What is a Membership Record?

- Belongs to one contact
- Is of one Membership Type
- Can be rolling, fixed, or lifetime
- Has a status – Current, Expired...
- Can have an associated payment
What is a Membership Record?

Click Add Membership to record a new membership. Click Submit Credit Card Membership to process a Membership on behalf of the member using their credit card.

Active Memberships

<table>
<thead>
<tr>
<th>Membership Type</th>
<th>Member Since 2015</th>
<th>Start Date</th>
<th>End Date</th>
<th>Status</th>
<th>Source</th>
<th>Auto-renew</th>
<th>Related</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership 2</td>
<td>August 1st, 2015</td>
<td>August 1st, 2015</td>
<td>July 31st, 2019</td>
<td>Current</td>
<td>DEMO20151130</td>
<td>N/A</td>
<td>View Edit Renew...</td>
</tr>
</tbody>
</table>

External ID: I201511300708  Contact ID: 730

Last Change by: Dan O'Brien (November 30th, 2015 5:05 PM) → View Change Log
Created: November 30th, 2015 8:05 PM

Access Keys:?
Viewing and Editing Membership Payments

**View Membership for Dan O’Brien**

<table>
<thead>
<tr>
<th>Member</th>
<th>Dan O’Brien</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership Type</td>
<td>Membership Type 1</td>
</tr>
<tr>
<td>Status</td>
<td>Pending</td>
</tr>
<tr>
<td>Source</td>
<td>Online Contribution: Join Our Professional Organization</td>
</tr>
<tr>
<td>Member Since</td>
<td></td>
</tr>
<tr>
<td>Start date</td>
<td></td>
</tr>
<tr>
<td>End date</td>
<td></td>
</tr>
<tr>
<td>Auto-renew</td>
<td>No</td>
</tr>
</tbody>
</table>

**Related Contributions**

Click arrow to view payment details.

<table>
<thead>
<tr>
<th>Amount</th>
<th>Type</th>
<th>Source</th>
<th>Received</th>
<th>Thank-you Sent</th>
<th>Status</th>
<th>Premium</th>
</tr>
</thead>
<tbody>
<tr>
<td>$100.00</td>
<td>Member Dues</td>
<td>Online Contribution: Join Our Professional Organization</td>
<td>April 6th, 2017 7:58 AM</td>
<td></td>
<td>Pending (Incomplete Transaction)</td>
<td></td>
</tr>
</tbody>
</table>
Self-Service Forms

• Don’t require logins
• But can create logins
• Pre-fill user contact data
• Opportunity to collect more information
Member Signup and Renewal

Members are the life-blood of our organization. If you're not already a member - please consider signing up today. You can select the membership level that fits your budget and needs below.

Membership Levels
Please select the appropriate membership level below. You will have a chance to review your selection and the corresponding dues on the next page prior to your credit card being charged.

Membership

- General - $100.00
- Student - $50.00

Email Address

Credit Card Information

Card Number

Security Code

Expiration Date
Contribution Pages

• Create any number of public forms
• Along with Donation pages, managed under “Contributions” > “Manage Contribution Pages”
• Manage text and receipts.
• Use Profiles for additional info.
Limits of Contribution Pages

CiviCRM-enabled CMS form builders sometimes provide

- More flexibility with Relationships
- More flexibility with presentation and flow.
Integrations with your CMS

• Easier for members to update their info.
• Use Member Sync to grant access to restricted content.
• Granularity available by Membership Type or status.
CiviCRM Extensions Directory

- Expanded functionality from the community
- “Administer” > “System Settings” > “Extensions”
- “Add New” tab or search the full directory.
- Be sure your developer posts your customizations for others to benefit from.
What is a Membership Type?

- Name and description
- Membership Organization
- Financial configurations
- Period/TimeSpan
- Primary grouping in reports
Edit Membership Type

Name: Membership Type 1

e.g. 'Student', 'Senior', 'Honor Society'

Description: Professional Organization

Description of this membership type for internal use. May include eligibility, benefits, terms, etc.

Membership Organization: Professional Organization

Members assigned this membership type belong to which organization (e.g. this is for membership in 'Save the Whales - Northwest Chapter'). NOTE: This organization/group/chapter must exist as a CiviCRM Organization type contact.

Minimum Fee: $15.00

Minimum fee required for this membership type. For free/complimentary memberships - set minimum fee to zero (0). NOTE: When using CiviCRM to process sales taxes this should be the tax exclusive amount.

Financial Type: Member Dues

Select the financial type assigned to fees for this membership type (for example 'Membership Fees'). This is required for all membership types - including free or complimentary memberships.

Auto-renew Option:
- No auto-renew option
- Give option, but not required
- Auto-renew required

Membership Type: 1 year

Duration of this membership (e.g. 30 days, 2 months, 5 years, 1 lifetime)
Period and Renewals

- How long does a membership last?
- Renew automatically: never, user-choice or always
- Fixed or rolling start-dates.
Status Rules

Administer > CiviMember > Membership

Status Rules

- Using a “New” Status
- Using a “Grace” Status
- (Be sure to enable the scheduled job)
Edit Membership Status

Name: Grace

Label: Grace
Display name for this Membership status (e.g. New, Current, Grace, Expired...).

Start Event: end date
When does this status begin? EXAMPLE: New status begins at the membership 'join date'.

Start Event Adjustment
Optional adjustment period added or subtracted from the Start Event. EXAMPLE: Current status might begin at 'join date' PLUS 3 months (to distinguish Current from New members).

End Event: end date
When does this status end? EXAMPLE: Current status ends at the membership 'end date'.

End Event Adjustment: 1 month
Optional adjustment period added or subtracted from the End Event. EXAMPLE: Grace status might end at 'end date' PLUS 1 month.

Current Membership?
Should this status be considered a current membership in good standing. EXAMPLE: New, Current and Grace could all be considered 'current'.

Administrator Only?
Check this box if this status is for use by administrative staff only. If checked, this status is never automatically assigned by CivilMember. It is assigned to a contact's Membership by checking the Status Override flag when adding or editing
Other ways to use Member Status

- Give discounts with CiviDiscount
- Give negative discounts (penalties for expired)
- Smart Groups
- Scheduled Reminders
- Member Directory
Scheduled Reminders

- Administer > Communications > Schedule reminders
- Remind of pending payment (auto-renew)
- Encourage members to join again
- Automatically send a Membership packet
- Request completion of a survey
CiviDiscount is an extension.

- Limited time offer with a discount code
- “Automatic Discounts”
- Negative Discounts
Price Fields

Must be contained in a Price Set

Can have any combination of:

• Memberships
• Sliding Scale Pricing
• Periods
Member Benefits

- SmartGroup to address only members
- Special Pricing for Events
- Members Only Content on your website with Member Sync
Exports and Reports

Export using Advanced Search or Membership > Find Members

Reports > Memberships
- “Summary” for financials
- “Details” for Contacts
Questions and Answers:
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