June, 2022

SCWDC Membership Manual

Introduction:

SCWDC’s Membership Program reports to the Club President (currently Ruth D’Alessandro). The Program’s mission is to maintain the membership database, process new membership applications, renewals, and payments, and to promote the maintenance and growth of the Club’s membership.

In 2016 the Club created a website powered by Wild Apricot, a commercial software company that specializes in member-based organizations such as associations, nonprofits and clubs. The website allowed the Club to automate many membership functions that were previously performed by volunteers, thus eliminating the use of paper application forms and manual recordkeeping processes.

Membership Types:

The Club’s Bylaws specify five different membership types: Individual (Single), Couple/Family, Junior, Complimentary, and Honorary. Membership dues only apply to the Single and Couple/Family membership types.

The Club’s Rules of Procedure specify the membership dues structure, as follows:

One-year Single (new) - $45

One-year Single (renewal) - $35

One-year Couple/Family (new) - $70

One-year Couple/Family (renewal) - $53

Three-year Single (new) - $105

Three-year Single (renewal) - $95

Three-year Couple/Family (new) - $166

Three-year (Couple/Family (renewal) - $149

Any person who is interested in skiing and/or related sports can apply for Club membership. All members except Junior and Complimentary are eligible to vote and hold office.

In the past, 5-year, 10-year and Lifetime memberships were also offered, but then discontinued. Those members are still carried in the membership database, but their memberships are not eligible for renewal, and must be converted to one of the membership types shown above. Honorary and Complimentary memberships also exist, but must be established by the Board of Directors, and are not subject to dues.

The Club’s dues have not changed for several years, except for the “Initiation Fee”, which is the extra fee charged for new memberships, compared to membership renewals. The fee encourages members to renew their memberships annually, as some members choose to let their memberships lapse for personal reasons, then rejoin later.

Recurring Memberships:

The website provides the capability to set up recurring dues payments – aka preauthorized payments or subscriptions – so that membership dues can be automatically charged on a regular schedule. This would save members the trouble of having to manually renew their membership. Recurring payments can be enabled for One Year Single- and One-Year Couple/Family memberships, but not for either of the Three-Year membership types.

The recurring payments must be made online by credit card. The credit card number is stored within the Wild Apricot Payment System (Affinipay) in a secure vault and is not stored anywhere in the membership database or elsewhere within the website. Members can update their credit card number as needed and can also opt out of recurring payments at any time.

Members and Contacts:

Everyone in the Wild Apricot membership database is considered to be a *contac*t. A contact can be a member, an event attendee, or a SkiGram subscriber. Contacts can be added automatically through the website, added manually by an administrator, or imported in bulk. Almost all non-member contacts in the membership database were added automatically when they registered for a Club event.

Information about each contact is stored in a separate database record, with each record storing different information fields (first name, last name, email address, contact information, etc). Database fields can be added, deleted, modified or updated at any time.

Membership database fields are divided into two classes: common fields – fields that apply to all records (first name, last name, email address) – and fields that only apply to membership applications or event registrations.

Members are a special type of contact. They can have special access to member-only pages and events, and their contact records include membership-related fields such as date joined, renewal date, member status, and contact information.

A contact becomes a member when they have submitted a membership application, paid membership dues, and have been approved by the Membership Chair or Administrative Manager. The main reason for NOT approving a paid membership application would be if the applicant’s email address were not valid. In that case the Membership Chairman would contact the applicant by telephone to correct the email address.

Couple/Family Memberships

Couple/Family memberships are limited to two or more persons who reside at the same residence. There is no limit on the number of family members.

When a Couple/Family membership application is approved, the website creates a membership ***bundle,*** a collection of members who are linked together and managed by the applicant – the bundle administrator. The bundle administrator will receive all automated email notifications from the website.

Bundle members share the same renewal date, status, and membership level. The entire bundle is charged a single membership fee, which is paid by the bundle administrator. The bundle administrator can add members to the bundle during the membership application process, or they can be added later. If a prospective bundle member is already listed in the membership database as a contact, an administrator can “merge” the contact’s database information into the membership bundle.

Member Email and Password:

A valid email and password is required to log in to the Wild Apricot website as a member, administrator, or contact (usually an event participant). The email address must be the same as what was submitted on the event registration or membership application.

Passwords are automatically generated by the website and emailed by the system when someone creates a Wild Apricot account by signing up as a member, donor, or event attendee. The password can be set manually by an administrator. However, once established, the password is not visible to an administrator.

Passwords must be a minimum of 7 characters, a maximum of 50 characters, and any combination of letters, numbers, and characters (except spaces).

A member or other contact can change their password by clicking the ***Change Password*** link that appears below or beside the link to their profile after the member logs in.

Some Couple/Family members prefer to use one email address and password for all family members. This can result in problems when multiple family members want to register for an event such as a ski trip. In that case, the bundle administrator would need to register and pay for the other family registrants.

Members Status

When someone visits our Wild Apricot website, the options available to them depends on whether they are a member or a contact, and on their member or contact status. A member can see their membership status on their member profile. A member's status can be updated manually by an administrator or automatically by the system.

The website automatically monitors member renewal dates, creates renewal notification emails, renewal invoices, and updates the membership status based on the renewal policy settings.

Members and contacts can have any of the following statuses:

Active
A member in good standing with full member benefits (e.g. listed in member directory, access to restricted pages, etc).

Lapsed
A member who has lost membership privileges because of unpaid membership dues. A member's status may be set to lapsed if they have not renewed their membership within a certain period following their renewal date. A lapsed member does not receive automatic renewal notices, poll announcements, or appear in member directories, and is not allowed to view member-only pages, register using member-only registration types, complete polls, add comments to blog pages, or post or reply to forum topics. Unlike a suspended member (see below), a lapsed member can restore their membership by paying the renewal fee.

Pending - New
A membership that has not been activated because it is awaiting administrator approval or payment of the membership fee. Members with a status of Pending - New will not be able to view member-only pages or register for events using member-only registration types. They will, however, receive event announcements and email blasts, even if sent to members only.

Pending - Renewal
A member's membership is up for renewal, and a renewal invoice has been generated, or the member has begun the renewal process, but hasn't yet paid the membership fee.

Pending - Level change
The member has initiated a level change but is either awaiting administrator approval, or has been not yet paid the membership fee for the new level (where required). Members must pay the full membership fee when they change levels. There is currently no pro-rating based on the previous membership level.

# Revoked

The Board of Directors may revoke or decline to renew the membership of any member for conduct it considers disruptive to the interests of the Club. Once the membership is revoked, it cannot be restored without approval from the Board of Directors.

Suspended
A member whose membership privileges have been cancelled and now appears as a non-member contact. Suspended members do not appear in member directories or featured member gadgets, and do not receive emails sent to all members. A suspended member cannot renew an expired membership but can apply for a new membership.

CONTACT STATUS

Active
A contact who has not been archived, and therefore appears in the contact list.

Archived
A contact who has been removed from the contact list without being deleted from the membership database. An archived contact is automatically excluded from email blasts – including event notices – and does not count toward the database limit (currently 2000 contacts).

Contacts are usually archived manually by an Administrator to keep the total number of contacts under the database limit. The website will issue a warning message when/if the limit is exceeded. If the number of contacts is not reduced, website functionality will be affected or disabled until the number of contacts is reduced, or the website limit is increased (at an extra cost).

When choosing the contacts to be archived, the best process is to use the Advanced Search function to find non-member contacts who have not logged in to the website, nor attended a Club event for more than a year or two.

Archived contacts are automatically restored when they log in to the website, register for an event, or apply for membership. If the contact is a member, their membership level and status will also be restored with a Lapsed status.

Archived contacts are not automatically restored if they pay an invoice by clicking the link in the invoice email without logging in to the website. In that case, an administrator would need to review and/or restore their Active status.

# How status affects website functionality

When someone visits the website, the options available to them depends on whether they are a member, a contact, or someone not in the membership database. If they are a member, their options are further defined by their membership status. A member can see their membership status on their member profile. A member's status can be updated manually by an administrator or automatically by the system.

MEMBERSHIP EMAILS

The website sends automated emails when someone applies for membership, when they approach their membership renewal, and when they renew their membership. These emails are controlled by website settings, and can be customized by Membership administrators

The delivery of membership emails is controlled separately in the website for each membership level. Each membership email can be customized separately and/or the. default email templates can also be customized

# Membership application emails

Membership application emails are sent when someone completes the membership application form. Bundle activation emails are sent when a new membership bundle is created, or a new member is added to an existing bundle.

### Renewal reminders

Renewal reminders are sent when a member is approaching their renewal date. You can turn the various renewal reminders on or off, and control how many days ahead of the renewal date they are sent. A Membership administrator can also control whether the member and/or bundle administrator receives the reminders

### Renewal notifications

Renewal notification messages are sent when a membership has been renewed, or when an automatically recurring renewal has failed.

### Renewal pending

Sent when membership renewal is initiated but online payment has not been submitted within 15 minutes.

### Renewal confirmed

Sent when the renewal payment is submitted online, or a check payment has been received at the Club office and the payment has been manually posted to the website.

### Credit card Expiration notice

Sent two weeks before and on the date of credit card expiration.

### Recurring renewal failed

Sent when a recurring payment for a membership renewal fails

Membership Invoices and receipts

Invoices are automatically emailed when a member performs a self-service transaction such as signing up for a membership or renewing a membership.