

## NYSW Membership Process Proposal

Over the past year we have fine-tuned the membership dues process. Chapters are still struggling with membership payments that they receive via check. We have had numerous issues where checks have gotten lost or treasurers have not remitted payment in a timely fashion or at all. This is becoming a very common problem. We were approached by a few chapters to take over their dues processing due to these issues. We are now managing about 10 chapter's dues.

This takes a big burden off the chapter treasurers. It has worked great for the past year with the State processing all online payments and reimbursing the chapters. We feel it would be a benefit for the rest of the chapters to allow the State to manage their offline dues.

Below are the items we would like to change in the current process:

1. **New Members (Pay by check)** – The membership application along with the entire dues amount (state+chapter+region) is mailed to the State Database Manager for processing. The chapters will be reimbursed once a month.
2. **Renewal Notices** – All renewal notices will contain the State Database Manager's mailing address.
3. **Renewal Notices (Pay by check)** - Renewal checks will be processed by the State Database Manager and then reimbursed once a month.
4. **Chapters receiving dues payment** – Chapters will notify their members that all dues checks will be made out to NYS Women Inc. They should mail them directly to the State Database Manager. If the chapter treasurer receives any checks they should mail them directly to the State Database Manager.

## Current Membership Dues Process

### *Membership Process – Online*

1. **Online Membership Application** - There is one online membership application at the state level (<http://nyswomeninc.org/Membership/MembershipApplication.aspx>). All local chapters can point their web sites to the state application instead of having to maintain one of their own.
  - a. **Dues** – The membership database has a field in it that contains the dues of the local chapter and region. If a chapter or region changes their dues amount they will fill out the online dues change form or notify the State Database Manager and specify date that it will take place. We need this information for two reasons:
    - i. When new members apply depending on the local chapter they choose then the appropriate dues will be displayed on the payment page.
    - ii. When renewal notices are sent to members the appropriate dues amount will be displayed on these renewal notices.
2. When someone applies online they have the choice to pay by credit card or by check.
  - a. If they choose credit card they are taken to PayPal to enter their payment information. We will charge a \$1.50 processing fee for all credit card payments like we do with event registration.
  - b. If they choose check they are taken to a page that they can print out and it tells them where to send the check. The checks are sent to the State Database Manager
3. When someone applies for membership online and submits the application the State membership people are notified (2<sup>nd</sup> VP and State Database Manager). In addition to the State people the local chapter president and treasurer will also be notified of a new member for their chapter. This way everyone is kept in the loop and can follow up accordingly. If the chapter does not have anyone with an email address all reports will be viewable online and if need be the reports can be snail mailed with the monthly check from the State Treasurer.
4. **Membership Database** – When someone applies online the application will be sent to the membership database person. There is a menu option for “New Members”. All membership applications will be put in this area until the State Database Manager confirms them. If payment via check, it is when check is received. If payment by credit card they can be approved immediately. This will allow the State Database Manager to send the new member their membership card and confirmation notice. This confirmation notice also sends an email to the local president/treasurer so they are aware of the credit card payment too.

5. **Finances** –All checks will be sent to the State Treasurer by the State Database Manager. The State Treasurer will be notified by PayPal when there is an online payment. Once a month the State Treasurer will issue a check to all local chapters and regions that had members renew or new members pay. A report in the membership database will show who needs to be paid what for the month. You will be able to pull up past month reports too. Checks will be issued the 1<sup>st</sup> week of every month.

### ***Membership Process – Offline***

1. Send paper application and dues check to State Database Manager.
2. State Database Manager will enter the new member into the membership database. This will trigger a new member confirmation email send to the member and local Chapter treasurer.

### ***Membership Renewals***

1. **Renewal notices** – The State Database Manager will send out the renewal notices from the membership database once a month. They are sent 2 months prior to the member’s renewal date and every month after that until they are paid. These email or print notifications will contain the exact dues amount owed and a link to renew online. The renewal notices will be copied to the local treasurer if emailed to the member.
2. **Renewal Payment** – The member will then have the option to send a check to the address stated on the renewal notice or click on the link in the notice to renew online via a credit card. If the member clicks on the link then their information will be displayed and they can click on the payment button to pay via credit card.
  - a. **Online Payment** – The State Treasurer will be notified of the payment via PayPal along with the State Database Manager.
  - b. **Offline Payments** - Local Chapter treasurers will need to remit payment of the State portion to the State Database Manager in a timely fashion.
3. **Renewal Confirmation** – Once the payment is received then the State Database Manager sends out a renewal confirmation notice to the member and local president/treasurer.