

TOP NETWORK MEMBERSHIP ACTION TEAM

Membership management software implementation update
November 20, 2012

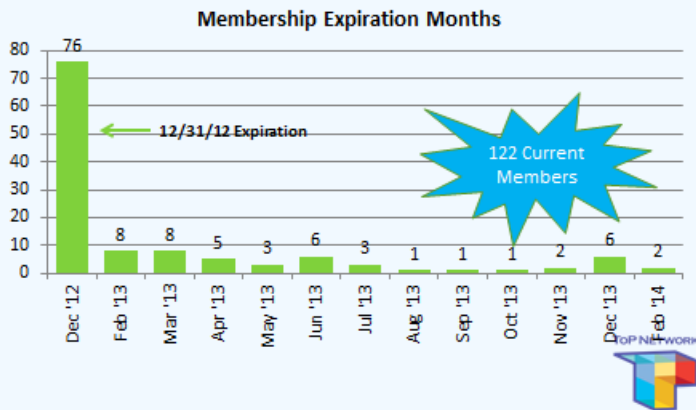
IMPLEMENTATION STATUS UPDATE

See Attachments A & B

MEMBERSHIP STATUS AND RENEWALS UPDATE



Membership Status & Renewal Update



We currently have 122 members. 76 of these memberships expire on 12/31/12. The remaining 46 memberships expire over the months shown at left. (8 members have already renewed.)

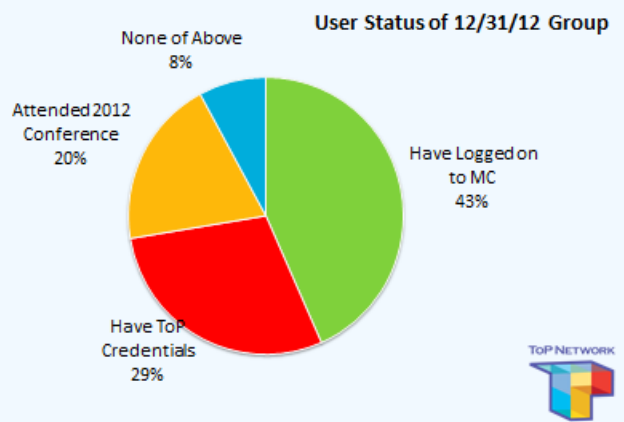
At this time one year ago, the network had 44 paid members (expanding to 66 by 12/31/12).

For purposes of contemplating the challenges of engaging members in renewal, the 76 memberships expiring on 12/31/12 can be organized into the following categories:

- Those who have logged on to the www.top-network.org site. They will be more familiar with the site and have demonstrated sufficient interest to log on.
- Those with ToP credentials. These members have not logged onto the site but their credentials suggest likelihood of loyalty to the network. They may need additional attention, but will likely join.
- Those who attended the 2012 conference. These members are all from California, joining the network as part of registering for the 2012 conference in Sacramento. The risk of their non-renewal is high.
- Members who do not fit into the preceding groups.

The list of names composing each group is provided as Attachment C.

Member Status & Renewal Update



RETENTION STRATEGIES

The committee reviewed names composing each of these groups. Following review, committee members made the following suggestions:

- Personal contact is important. We need a strategy to generate that outreach. There may be a variety of *personal connection strategies*. *Need some diversity.*
- *As we start putting more interesting stuff on the website, notices of something to access may be helpful. If you are you interested in x,y,z -- check here*
- *There are messages still coming from Groupsite – we may need Mary to send something out from MemberClicks –This is what we are using MemberClicks for. Having multiple websites is confusing. Figure out a website to use.*

DEVELOPING TOP-NETWORK.ORG

The retention discussion segued into a discussion of using the website as a membership retention and recruitment tool. Key takeaways include:

- We need to optimize the capability of top-network.org to add benefit to members.
- The Membership Action Team is the logical group to start that focus and we can invite others to participate.
- We need to put something on Groupsite to alert members that we are moving to the new site.
- We need to open participation to those who want to join in and define what we need so it doesn't seem like a huge thing.

NEW MEMBERSHIPS

Deferred to next meeting

ASSIGNMENTS - NEXT STEPS

Sunny,
Nancy,
Ester Mae,

- Review draft renewal notice letters (Attachment B) for needed changes. (Notice 1 will auto send on December 1.)

All

- Review memberships expiring lists (Attachment C). Identify those you will contact and suggest names of others we could recruit to make contact where appropriate.

Nileen
Ester Mae

- Review MemberClicks social network functionality and report back on proposed use

Minutes respectfully submitted by Nileen Verbeten

ATTACHMENT A

IMPLEMENTATION UPDATE:

PEOPLE

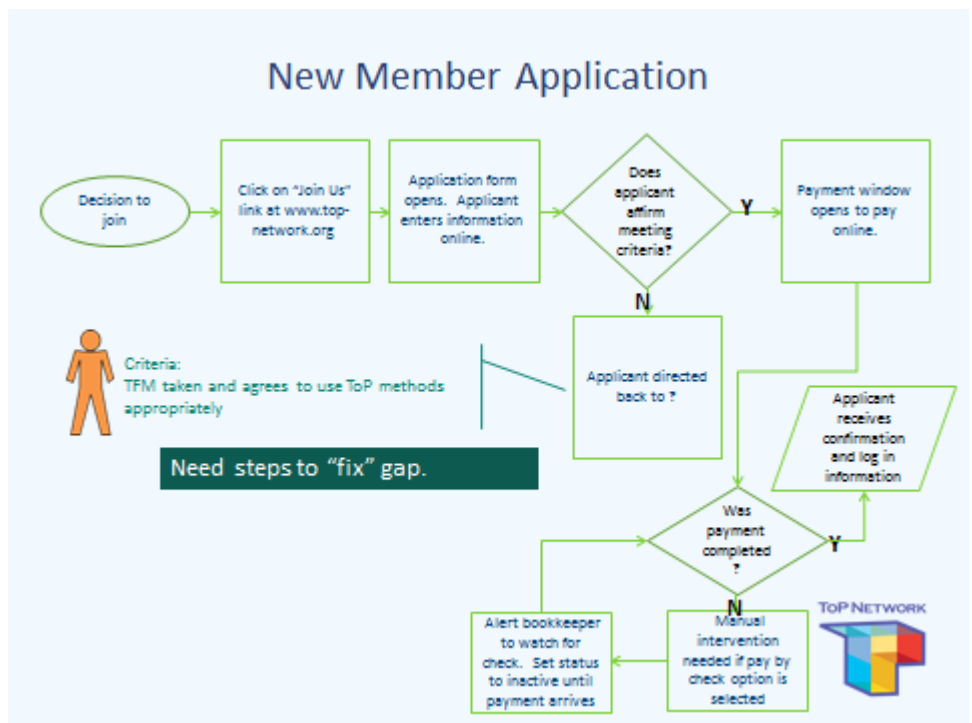
- Data bases are configured and data preloaded to include special ToP Status (certification, trainer (apprentice, mentor, inactive), registrar)
 - 122 Active Members – full access to member side content.
 - 62 Basic Contacts – Non-member ToP Trainers data loaded. Access limited to public content.
- View all directory (“Find a Facilitator”) of members appears on “Community” (name, city, state and ToP credentials) (~ 60% have city/state data in profile)

TRANSACTIONS IN OPERATION

- New member application
- Membership renewal
- Gathering and post gathering event registration
- On-line, real time payment via credit card and check
- Adding basic contact – can be done by anyone

MEMBERSHIP APPLICATION PROCESS FLOW:

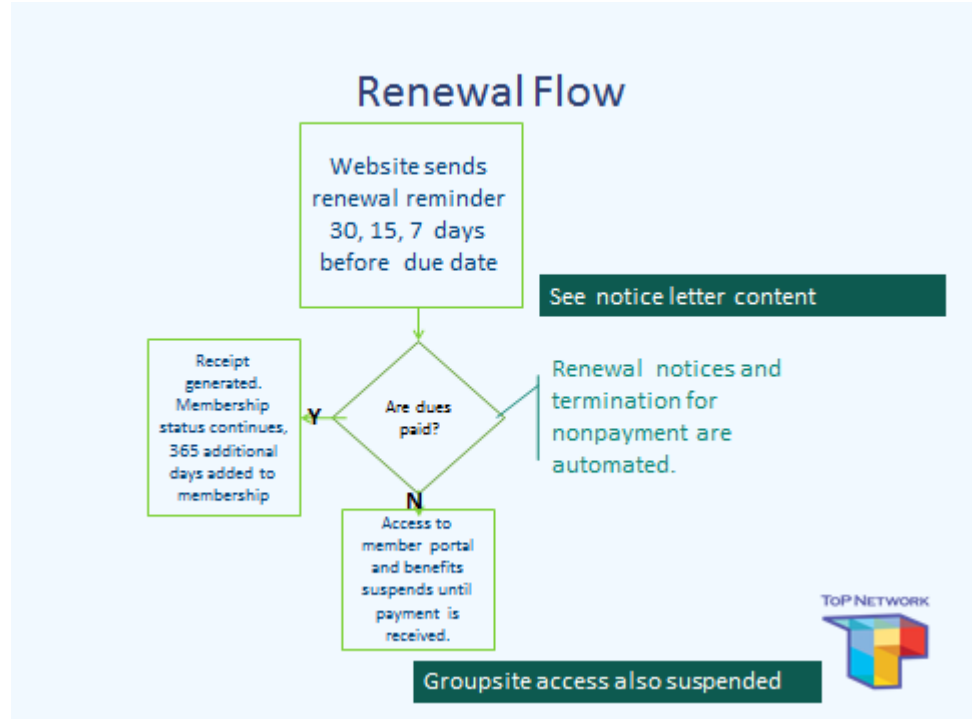
- Applicant must affirm they have taken TFM and that they will use ToP Methods appropriately in order to submit form and proceed to payment.
- Payments made online activate membership in real time, permitting the new member immediate access to the member website.
- For payments by check, access to member side of website is granted after check is received. This is a manual process and requires coordination with bookkeeper



- The promised process for review of all new member applications remains to be developed.
- Need steps to “fix” gap, e.g., robust course listing in events to encourage people to sign up.

MEMBERSHIP RENEWAL PROCESS FLOW

- Automated reminder letters are generated prior to expiration date. (See letters below.)
 - 30 days before
 - 15 days before
 - 7 days before
 - Expiration notice
- Login access is limited to renewal form.
- **Need to set up manual processes to manage:**
 - **Member discounts to events no longer apply**
 - **Suspended access to Groupsite**



PAYMENT:

- Real-time payment gateway is operational. Access to benefits is immediate.
- User can choose to pay by check.
- Confirmation is immediate and a receipt is attached to profile, accessible to member.

ATTACHMENT B

MEMBERSHIP RENEWAL NOTICE LETTER SERIES

30 days before termination:

Subject: ToP Network Membership Renewal Notice

##Preferred Name## ##Last Name##

Wow! Can you believe ToP Network dues time is rolling around again?

We have a new process this year. We have automated dues collection to streamline our process and shift valuable volunteer time away from membership processing to developing strategies to increase the value of membership.

Your membership year expires ##Expiration Date##. We look forward to our continuing relationship. To add 365 more days to your membership in the ToP Network and access to membership benefits, click on the link in this email. You can pay quickly on line and have a receipt immediately.

Payment before ##Expiration Date## will assure that no member services will be interrupted or suspended. Your membership status ends ##Expiration Date##; there is no grace period. If you've already been online, you know we have transferred your profile information from Groupsite to www.top-network.org. We're developing many tools to help facilitators connect and prospective clients to find us, so the renewal form has many fields to fill in about you and your work. If we have that information already, the form will already be filled out and you can just review it for accuracy. If you are in a hurry, just fill out the items that are in bold font.

Here's what you do:

1. Click on: <http://www.top-network.org/get-involved> (Note: Firefox, Safari and Chrome browsers are friendly. If you use Internet Explorer, go first to www.top-network.org, and then click on "Get Involved" as a two-step process.)
2. Click on "Renew Membership"
3. Sign in using your username (##Username##) and password. (If you cannot remember your password, click on "forgot password". Where prompted, use this email address and the system will email your password to you.)
4. Fill in your data, submit form and payment.

If you have problems, email [me](#) or [Ester Mae Cox](#).

Thank you for your continued support of the ToP Network.

Nileen Verbeten, 2012 ToP Network Member Chair
Participate. Educate. Facilitate. Innovate.

15 days prior to expiration:

Subject: ToP Network Membership Renewal Reminder #2

##Preferred Name## ##Last Name##

I know – I’m here checking in and asking again – I don’t want you to “miss out” on anything fun and fabulous from the ToP Network.

You’re at risk of being dropped from the Member list – with the www.top-network.org website, it’s an automatic drop, so hopefully, you’ll find the resources to renew today!

Payment before ##Expiration Date## will assure that no member services will be interrupted or suspended.

Click here <http://www.top-network.org/get-involved> to add 365 more days to your membership in the ToP Network. (*Firefox, Safari and Chrome browsers work more smoothly, if you use Internet Explorer, go first to www.top-network.org, click on “Get Involved” and “Renew Membership”.*) Your username is ##Username##. If you don’t know your password, click on “forgot password”, enter your username and the system will send you your password.

If you have problems, email [me](#) or [Ester Mae Cox](#).

Thank you for your continued support of the ToP Network.

Nileen Verbeten, 2012 ToP Network Member Chair
Participate. Educate. Facilitate. Innovate.

7 days prior to expiration:

Subject: Don't let your ToP Network membership Lapse!

##Preferred Name## ##Last Name##,

We're down to "serious" now – this is last and final notice for renewing your ToP Network Member dues – to keep current and have access to ToP Network membership benefits: www.top-network.org; Groupsite, member pricing, etc.

Renewing today keeps you "in the loop" and enjoying the benefits of ToP Network membership.

Not renewing means your membership will automatically lapse on ##Expiration Date##. You will be suspended from the ToP Network Member list and not able to access the website for resources, for networking, and for keeping up with all thing ToP!

Of course, you can renew later, but it's lots easier to not have your membership lapse.... We really want you to be involved!

Click here <http://www.top-network.org/get-involved> and "Renew Membership" to add 365 more days to your membership in the ToP Network. *(Note: Firefox, Safari and Chrome browsers are friendly. If you use Internet Explorer, go first to www.top-network.org, and then click on "Get Involved" as a two-step process.)*

If you have problems, email [me](#) or [Ester Mae Cox](#).

Nileen Verbeten, 2012 ToP Network Member Chair
Participate. Educate. Facilitate. Innovate.

Membership lapse notification

Subject: ToP Network invites you back

##Preferred Name## ##Last Name##

Your membership in the ToP Network lapsed on ##Expiration Date##.

We will miss you. We're here for you if you want to renew.

To renew, click [here](#) or copy and paste this link into your browser:

https://top.memberclicks.net/index.php?option=com_mc&view=mc&mcid=form_130011.

Upon receipt of the renewal form and payment of dues, you'll have access to full benefits of membership in the ToP Network.

If you've forgotten, your username is ##Username##. The system will email you your password if you've forgotten it.

We'll be here when you are ready to come back.

Nileen Verbeten, ToP Network Membership Chair, 2012
Participate. Educate. Facilitate. Innovate.

ATTACHMENT C

Memberships Expiring 12/31/12 by Category

Have logged onto top-network.org:

Roger Alexander	John Epps	Cherie Lockett	Melinda Posner
Linda Alton	Suzanne Esber	Spence Morley	Matthew Rezac
Terry Bergdall	Beth Glommen	Anne Neal	Marti Roach
Raines Cohen	Gordon Harper	Alisa Oyler	Dionisio Salazar
Sheila Cooke	Kateri Harrison	Marilyn Oyler	Eunice Shankland
Janice Critchlow	Nancy Jackson	George Packard	Sherwood Shankland
Bill Davis	Dennis Jennings	Elise Packard	Catherine Tornbom
Ann Epps	Cheryl Kartes	Larry Philbrook	Judy Weddle

Have not logged on but do have ToP Credentials (CTF, trainer, registrar):

John D Baker	Irina Fursman	Sara Levinson	Bill Staples
Nadine Bell	Alan Gammel	Kathy McGrane	William Taylor
Jonathan Bell	Rudy Gonzalez	Erin Murphy	Jean Watts
Deb Burnight	Virginia Hamilton	Mark Pixley	Erness Wright-Irvin
Lisel Burns	Rachel Hefte	Ron Robinson	
Ann Carr	Heidi Kolbe	Jane Stallman	

No log-on, no ToP Credentials, membership associated to 2012 ToP Conference

Selma Abinader	Pat Ferris	Kristi Matal	Michael Summers
Jahn Ballard	Betsy Gowan	Sonya McPhaul	
Carolyn Bloede	Sharon Huntsman	Emily Sadigh	
Holly Burkett	Carl Mack	Steve Spahr	

Others

Kendra Abel	Connie Foster	Deb Marois	Kathleen Paulo
Mandy Ellerton	De'bora Johnson	Margaret Okuzumi	Susan Stewart