# Expiration Dates on Member Profiles

**EXPLANATION:** Currently all expiration dates on our member profiles are set to 1/31/2014. The reason we do this is because - in the past, a member of the EC loaded the data from Cvent (for the conference attendees) into Memberclicks, and they were very busy during that time period. In addition, the process to move the conference attendees into our database is a lengthy one, since some pieces have to be checked manually (like making sure no Lifetime members get modified and people who’ve paid more than one year ahead don’t lose that time), and can take a couple of days work to finish entirely. So we wanted a month buffer to make sure no one expired on 12/31 because we hadn’t gotten around to updating the database.

**PROBLEM:** When a person uses the New Member Application during the month of January, the system doesn’t understand that the real expiration date isn’t 1/31, but 12/31. So for instance, this year all people who joined in January of 2013 were given an expiration date of January 31, 2013. In February I needed to go in and reinstate those accounts to active, and correct their expiration date to January 31, 2014.

**SOLUTION:** Now that I’m handling the database move (and I can plan to make sure it’s done on 12/31-1/1), I don’t think we need that buffer date anymore. So I intend to remove the buffer and set expiration dates of 12/31 of the current year.

# Upgrading our current database limits

**EXPLANATION:** This year I had to purge 350 accounts at the start of the year, to make sure we had room to upload new users and grow through 2013. I’ve already had more than 20, of those individuals purged, come back, asking why they weren’t able to renew their accounts. These were all individuals who previously hadn’t logged in since 2011 (my purge criteria).   
  
**PROBLEM:** Our current plan (Level 3 below) has a maximum of 2500 custom member profiles - at our current rate we will likely exceed that number with the next training event (if not before through the New Membership form), requiring another purge.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Active Profiles** | **Inactive Profiles** | **Totals Current Profiles** | **Remaining Profiles In Current Plan** | **# who joined via 1040 Training** |
| 1244 | 1094 | 2338 | 162 | 164 |

**SOLUTION:** I am recommending we upgrade our Memberclicks package to the Level 4, with an increase of our monthly fees to Memberclicks of $55 a month, and an annual increase of $660 a year. Per Melissa’s previous instruction, the EIC budget for 2013 already reflects this change in our rate for Memberclicks.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Pricing Level | Level 1 | Level 2 | Level 3 | Level 4 | Level 5 |
| **Monthly Fee** | **$150** | **$200** | **$265** | **$320** | **$410** |
| Custom Member Profiles | 300 | 1,000 | 2,500 | 5,000 | 10,000 |

# Changing the font on the website

**EXPLANATION:** The Times New Roman font we’re currently using is causing crushing of text and some bad looking formatting on our website. I’d like to change it to a cleaner font, something along the lines of Ariel, Verdana, Tahoma, Calibri or Cambria.

Visit this webpage, for some examples of what the different fonts would look like.

<http://casfaa.memberclicks.net/index.php?option=com_content&view=article&id=413:new-font-text-for-casfaa-org-website&catid=21:sandboxes&Itemid=122>

**SOLUTION:** Per an email with Memberclicks, this small change would not require a large enough adaptation to our template for them to charge a fee - so this change would be entirely free. So if we do decide we want a change, we can make it at any time.

# Standardizing the Committee members lists

**EXPLANATION:** In the past, I list committee members in whatever format they are sent to me. This year, some Chairs put their job titles and/or schools, some included their email addresses - some sent me their whole committee roster and I stripped out the excess info.

**SOLUTION:** I think we should agree on a standardized format for displaying committee members, and how much of their information to include on the Committee’s page (i.e with school names, titles and/or contact information).

# Volunteer Roster

**EXPLANATION:** Melissa has asked me to start keeping a roster of those submitting Volunteer forms, so that we can thank them for their service at the end of the year, and engage them to renew their commitment to help out in the following year.

Are there also volunteers who are not submitting forms, just contacting their Chair directly? If so, we either need to be encouraging them to use the form as well, or the Chairs just need to send me their name, email address and phone number, so I can add them to the roster.

# Adding Membership Numbers to our Database

**EXPLANATION:** In recent days we have seen multiple requests for membership cards - at the request of their managers. In addition, using email address as our key identifier field (the one that the system uses to make sure there are no duplicate accounts) has encountered challenges when people change jobs/email addresses and don’t update their accounts - often they’ll just end up creating a new account which again leads to duplicates I have to investigate and clean out.

**SOLUTION:** My intention is to add a UniqueID attribute to our member profiles. This will give members a member number, which can be added to a template that will print them a membership card, and will allow us to create a completely static unique identifier for members, that can transfer from job to job, and help us further avoid duplicate accounts.  
  
If we do institute this change, I also think we should let the membership know (via a blast), both about instituting a membership card and that they will now have a unique member ID that will stay with them and hopefully reduce the occurrence of losing transaction/email history from one job to the next.

# Event Graphics/images

**EXPLANATION:** When flyers and other media are created for events, they are ultimately sent to me when it’s time to create the events. When I’m trying to great graphics and banners for these events, I often find myself manually ‘cutting up’ the flyer, and manually painting out background elements/text, to create web-friendly image(s) to use in the registration site.

**SOLUTION:** If possible, when graphics are created for events, can whoever designed them send the elemental images within, along with the final image? And then, can those items be forwarded to me along with the flyer, so I can create what I need for the event page?

# Webinar Payments

**EXPLANATION:** I am currently setting up online registration (through our GotoWebinar account) for a webinar that Daniel Reed is organizing. The webinar will be free for current members and $75 for non-members joining, as with most other training events. Current members will just need to enter their name, email and institution to register, and there will be nothing more for them to do.

We do not have the ability to charge directly through the Citrix/GotoWebinar tool (only their GotoTraining plans include internal payment processing) for the Non-Members. What the GotoWebinar tool does, is take them through the webinar registration, and then lets you redirect them to your own web page for payment. We have two ways to set up taking payment through Memberclicks, and would like input on the best method.

1. I will create a webpage with text which reads something like the following,   
     
   “Thank you for registering for the A is for Advocacy webinar. This webinar is free for CASFAA members. If you are not a CASFAA member, please click on the link below, to be taken to the New Member Application. You will become a registered member of CASFAA, with free or reduced-charge access to future 2013 CASFAA training events, including the A is for Advocacy Webinar...”   
     
   This page will link just to our normal New Member Application form. Through this method, their receipt will read that they are paying for membership, not the webinar.
2. I will create a new form, roughly identical to our New Member Application, but setup for the webinar specifically. It will still set up their membership, but because it’ll be a new form, I can set the receipt to show the payment is for the webinar, not for membership - in case their institution won’t pay for membership but will pay for a webinar.