

# Member and Donor Restructuring Proposal

## Presented by Karrie Kressler, Administration Director

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### Summary

Over the past few years, ATA Admin Staff have become intimately familiar with our membership management system, CRM, payment processor, bookkeeping software, and the backend of our website.

I have found that apart from a few basic integrations, these systems don't communicate with each other, and the manual workload to migrate information between systems is cumbersome, and likely accompanied by human error. We currently have separate platforms for our volunteer, membership and donor management systems.

We recently signed a contract with a small organization called Watergrass, and they are working with us to set up a platform that can handle all of these functions. Through this, our data will be more accurate, there will be less workload overall, and we'll be able to get a better picture of how people engage with the ATA in a more well rounded way. And we will save ATA financial resources through a single subscription instead of three.

With this system change, we have an opportunity to rework how we handle our membership and donors. After our Membership Visioning Exercise with Board and Staff last year, outreach to other organizations dealing with similar issues, and follow-up meetings among staff, here's what we have come up with as recommended next steps.

### Comparison

Current	vs.	New
Members and Donors are separate groups		Members and Donors are the same
Lowest member level is \$35		Donating \$1 makes you a member
Membership levels		No membership levels - Give what you can
Member perks distributed at \$20 and above		Member perks distributed at \$35 and above
Large number of large perks		Donor drives for large perks
Annual Payment (one-time or recurring)		Monthly or Annual Payment (one-time or recurring)
Renewal reminders		Renewal reminders
Payment processing on Paypal		Payment processing on our website
Contact info updated when member remembers		Contact info updated at each donation
Restricted Member Content available via login		Exclusive Member Content available via email distribution (hopefully via login in the future)

## Comparison Detail

**Members and Donors are the same:** We have found that members and donors already consider themselves to be in the same group within the organization.

On occasion we've had memberships expire right after a large donation and the member is rightfully upset. Imagine donating \$500 and then receiving an expiration email asking you to give \$35 today!

**Donating \$1 makes you a member:** This change will be easier to manage on the backend, will *greatly* increase our membership counts, and is a more inclusive model. Donors who give a one-time donation of \$35 or more will be eligible for member perks (see below)\*

**No membership levels - Give what you can:** Again, this is a more inclusive model. Folks can pay for their membership monthly, in small amounts or large amounts. They will be afforded the same benefits.\*

**\*Member perks distributed at \$35 and above, with the option to opt out:** To stay fair to our partners who offer discounts to ATA members, to add value to our exclusive content, and to provide backing for staff and volunteer time stuffing envelopes, we will distribute the following perks to donors who give a one-time donation of \$35 or more:

- Coupons for merch and services with ATA partner organizations
- 5% off at the ATA Store
- 10% discount at ATA Endurance Events
- Member stickers and ATA decal
- Exclusive member content
- **800 miles of trail** that you can hike, bike or ride any day of the year, knowing that you helped make it happen!

+Ability to opt out of member mailing.

**Donor drives for large perks:** Throughout the year, we'll run promotions where we'll offer incentives for donations at or above a certain amount for a limited time. This will include the ceramic mugs, and other large (and ATA branded) perks. This will allow us to draw folks in throughout the year, keep a limited inventory of these gifts, and reduce overhead costs for supplies, shipping and holding inventory.

**Monthly or Annual Payment (one-time or recurring):** Currently there is no way for members to pay for their membership on a monthly basis. This is a question that comes up often, and we believe members will be excited to see. This recurring (aka sustaining) giving model has proven very successful for every nonprofit organization we have consulted. On average, people will give at least 50% more annually if there is an option to pay monthly.

**Payment processing on our website:** Donors/members will be able to donate right on our website rather than be sent away to Paypal. Recurring payments will not require an account with a payment processor (as they do now with Paypal).

**Contact info updated at each donation:** When someone donates we will take all of their contact info at the same time, and our database will be automatically updated.

**Exclusive Member Content available via email distribution (hopefully via login in the future):** We recognize that historically restricted content has been an incentive to become a member. However, our login system has proved problematic and frustrating to members and staff alike. At this switch this content will be distributed via email link, and we're working to develop a system that would allow members to access this content on our site without a unique password. This will immediately address one of the biggest complaints of our members, and eliminate hundreds of requests to help with login, reset password, etc.

## Perks

**Everyone who donates \$1 or more is a member** (we add them to our member count)

- Receives an automated thank you

**Members who send us a one-time donation of \$35+ are eligible for...**

- Perks:
  - Coupons for merch and services with ATA partner organizations
  - 5% off at the ATA Store
  - 10% discount at ATA Endurance Events
  - Member stickers and ATA decal
  - Exclusive member content
  - **800 miles of trail** that you can hike, bike or ride any day of the year, knowing that you helped make it happen!
- Voting:
  - Can vote for the board of directors
  - and other voting and public comment opportunities as they arise

**Legacy Donors are people who donate \$25,000 or more. They receive a Lifetime Membership**

- Perks
  - All the perks of \$35+ members
  - Membership never expires
  - Recognition yearly at our Annual Meeting
  - Custom recognition (Gate plaque, etc)

## Guarding Against Revenue Loss

With any organizational restructuring, some attrition is possible. Here are the plans we intend to put in place to keep our donors and members happy and renewing:

### Communications

Before the switch occurs, we would communicate with members to let them know what's coming.

- Distributing exclusive content to all active members so they can continue to have access.
- Discontinuing auto-renewals through Paypal, and inviting members over to the new system once their membership expires

After the switch:

- We'll send out renewal reminders from the new system
- We'll also send out expiration notices via email and postcard to memberships that have expired for 1-3 months, and then after just a month moving forward. This isn't something we currently do.

On the website:

- Let folks know that the ATA is not offering larger perks at this time, but to subscribe to our e-newsletter to learn about upcoming donor drives.
- Keep all web links the same so folks can easily navigate to our donation and join pages.

### Member Perks

- Add some more incentives to membership
  - Plan one member exclusive gathering in 2022, and two in subsequent years
  - Increase number of coupons from partners
- By reducing the number of large perks we offer, we are safeguarding against increased expenses when we expand membership to include those who donate

### Other

- Encourage the gifting of membership during the holidays and for special events

## Other Organization Models

Fewer perks, simple forms

### PCTA

<https://www.pcta.org/donate/#membership>

The PCTA's membership benefits, regardless of donation level include:

## Supporter benefits

Your gift of \$35 or more qualifies you to receive the following benefits of membership.

- the knowledge that your membership helps to protect and preserve the Pacific Crest National Scenic Trail for future generations
- **The PCT Communicator**, PCTA's full-color, members-only magazine (International members will be charged an additional \$25 for shipping and handling);
- a Pacific Crest Trail decal;
- Discounts on PCTA store items and PCTA activities;
- invitations to participate in trail classes and volunteer trail projects

## ATC

<https://appalachiantrail.org>

The ATC's membership and donation forms are very similar. No large perks are offered.

Please confirm your preferences:

- I would like to receive a print copy of the A.T. Journeys Magazine.
- I would like to be emailed an electronic version of the A.T. Journeys Magazine.

## Access Fund

<https://www.accessfund.org/join-or-give>

Members, donors and renewing members fill out the same form on their website. This organization also uses the member drive model.

**LIMITED TIME ONLY**

**New and Expired Members: Gifts \$40 and above receive a FREE shirt.**

\*Existing members not eligible at this time

*Gift Frequency*

One Time	Monthly	Annually
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\$40	\$60	\$80	\$100
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Or Enter Other Amount \*

\$	Enter Amount
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If you donate \$40 or more, please select your t-shirt size. Memberships below \$40 are not eligible.

Select Option
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