



## **CHAPTER MEMBERSHIP**

### ***An Easy Guide to Managing Your Members***

When you're just starting out as a chapter, you may not be ready to devote a lot of resources to managing your members. Excel is a good way to begin; as your membership grows you may find that a dedicated database program is a better fit. (We used MemberTies for many years and found it to be inexpensive, powerful and simple to use. Customer support was unmatched. Check out <http://www.myrrro.com/memberties/index.php>)

Regardless of how your membership program develops, however, Excel is the basis for merging communications such as your "welcome to membership," "it's time to renew your membership," and newsletter mailings.

This guide assumes a basic familiarity with the use of Excel. The template spreadsheet includes very basic columns of information for tracking an individual member: who the person is, what they have paid you, when it was paid, when their resulting membership begins and ends, their contact information. You can add any number of columns of other information you would like to track or delete any that are not applicable to your situation.

Before you begin, there are a few key decisions to be made:

1. **Membership cost.** Will there be just one kind of member or will you offer different levels of support (i.e., individual, family, business, even lifetime)?
2. **Membership schedule.** When will an annual membership expire? At PPFF, we use a quarterly schedule – memberships expire 3/31, 6/30, 9/30 and 12/31. Obviously, that requires a little more management in terms of sending renewal reminders.
3. **Membership cards.** Will you merge them as a printed document or are hand-written ones perfectly fine? I like to merge mine; see the Practical Tips below for a disclaimer!
4. **Optional, but worth considering.** Do you want to include a little volunteer solicitation with your membership inquiries? If so, consider the "categories" of volunteers you want to solicit and use the spreadsheet to track them as well.

Once the terms of the program are established, assemble your documentation and begin! This packet contains some basic template documents that you can modify in any way your chapter sees fit.

#### ***Practical Tips Re: Templates:***

- Modify the letters to reflect your programs and needs for the upcoming year. Save as many versions as you need – all will reference your spreadsheet.
- Once the membership form says what you want it to, copy the text in the box and paste it into the other two for a "three to a page" form you can cut and include with your letters.

- The membership cards are set up to print on Avery 8371, 10-to-a-page business cards. Which is great when you have more than ten to prepare in a merge! Inevitably, I have fewer than that so when I run a print job I do a guessing game with potential quarterly expiration dates and Membership Levels for the blank ones at the bottom and space to hand-write the members' names. To save a headache, you may opt to simply write them out!

The documents that follow are saved in PDF form for reference and upload to the website. Contact Pam at [PMetzger@PAParksAndForests.org](mailto:PMetzger@PAParksAndForests.org) and she'll get Word/Excel documents to you and assist in any way to help you streamline the process.

<i>x</i>	<i>Last Name</i>	<i>First Name</i>	<i>Middle Name</i>	<i>Prefix</i>	<i>Salutation</i>	<i>Company Name</i>	<i>Street 1</i>	<i>Street 2</i>	<i>City</i>	<i>State</i>	<i>Zip Code</i>	<i>Email</i>	<i>Home Telephone</i>
	Smith	John	Q.	Mr. & Mrs.	Mrs. & Mrs. Smith		1232 Main Street	Apartment 1	Anytown	PA	17111	<a href="mailto:maryjohn@fakeemail.com">maryjohn@fakeemail.com</a>	717.123.4567
	Jones	William	R.	Mr.	Bill		PO Box 7		Anytown	PA	17111		814.123.4567
x	Daugherty	Alicia	D.	Ms.	Spiffy		8721 Center Avenue		Anytown	PA	17111	<a href="mailto:spiffygal@fakeemail.com">spiffygal@fakeemail.com</a>	570.123.4567

<b>Work Telephone</b>	<b>Donor?</b>	<b>Member?</b>	<b>Membership Begin</b>	<b>Membership End</b>	<b>Membership Level</b>	<b>Membership Amount Paid</b>	<b>Donation Amount Paid</b>	<b>Date of Payment</b>	<b>Check No.</b>	<b>Position With Chapter</b>	<b>Volunteer Interests</b>	<b>Notes</b>
717.123.4568	N	Y	3/13/2014	12/31/2015	Family	25		3/13/2014	1		Invasives	
814.123.4568	Y	N	10/1/2014	12/31/2015	Individual	10	50	10/1/2014	2144	Chair		
570.123.4568	Y	Y	10/1/2015	9/30/2016	Individual	10		10/4/2015	77		Trail work; Invasives	



«Next Record»  
WWW.FRIENDSOFMICHAUX.ORG  
MEMBER

«First\_Name» «Last\_Name»  
IS A MEMBER IN GOOD STANDING  
AT THE «Membership\_Level» LEVEL  
through «Membership\_End»



«Next Record»  
WWW.FRIENDSOFMICHAUX.ORG  
MEMBER

«First\_Name» «Last\_Name»  
IS A MEMBER IN GOOD STANDING  
AT THE «Membership\_Level» LEVEL  
through «Membership\_End»



«Next Record»  
WWW.FRIENDSOFMICHAUX.ORG  
MEMBER

«First\_Name» «Last\_Name»  
IS A MEMBER IN GOOD STANDING  
AT THE «Membership\_Level» LEVEL  
through «Membership\_End»



«Next Record»  
WWW.FRIENDSOFMICHAUX.ORG  
MEMBER

«First\_Name» «Last\_Name»  
IS A MEMBER IN GOOD STANDING  
AT THE «Membership\_Level» LEVEL  
through «Membership\_End»



«Next Record»  
WWW.FRIENDSOFMICHAUX.ORG  
MEMBER

«First\_Name» «Last\_Name»  
IS A MEMBER IN GOOD STANDING  
AT THE «Membership\_Level» LEVEL  
through «Membership\_End»



«Next Record»  
WWW.FRIENDSOFMICHAUX.ORG  
MEMBER

«First\_Name» «Last\_Name»  
IS A MEMBER IN GOOD STANDING  
AT THE «Membership\_Level» LEVEL  
through «Membership\_End»



«Next Record»  
WWW.FRIENDSOFMICHAUX.ORG  
MEMBER

«First\_Name» «Last\_Name»  
IS A MEMBER IN GOOD STANDING  
AT THE «Membership\_Level» LEVEL  
through «Membership\_End»



«Next Record»  
WWW.FRIENDSOFMICHAUX.ORG  
MEMBER

«First\_Name» «Last\_Name»  
IS A MEMBER IN GOOD STANDING  
AT THE «Membership\_Level» LEVEL  
through «Membership\_End»



«Next Record»  
WWW.FRIENDSOFMICHAUX.ORG  
MEMBER

«First\_Name» «Last\_Name»  
IS A MEMBER IN GOOD STANDING  
AT THE «Membership\_Level» LEVEL  
through «Membership\_End»



«Next Record»  
WWW.FRIENDSOFMICHAUX.ORG  
MEMBER

«First\_Name» «Last\_Name»  
IS A MEMBER IN GOOD STANDING  
AT THE «Membership\_Level» LEVEL  
through «Membership\_End»



WWW.FRIENDSOFMICHAUX.ORG  
MEMBER

\_\_\_\_\_

IS A MEMBER IN GOOD STANDING

AT THE \_\_\_\_\_ LEVEL

through \_\_\_\_\_



WWW.FRIENDSOFMICHAUX.ORG  
MEMBER

\_\_\_\_\_

IS A MEMBER IN GOOD STANDING

AT THE \_\_\_\_\_ LEVEL

through \_\_\_\_\_



WWW.FRIENDSOFMICHAUX.ORG  
MEMBER

\_\_\_\_\_

IS A MEMBER IN GOOD STANDING

AT THE \_\_\_\_\_ LEVEL

through \_\_\_\_\_



WWW.FRIENDSOFMICHAUX.ORG  
MEMBER

\_\_\_\_\_

IS A MEMBER IN GOOD STANDING

AT THE \_\_\_\_\_ LEVEL

through \_\_\_\_\_



WWW.FRIENDSOFMICHAUX.ORG  
MEMBER

\_\_\_\_\_

IS A MEMBER IN GOOD STANDING

AT THE \_\_\_\_\_ LEVEL

through \_\_\_\_\_



WWW.FRIENDSOFMICHAUX.ORG  
MEMBER

\_\_\_\_\_

IS A MEMBER IN GOOD STANDING

AT THE \_\_\_\_\_ LEVEL

through \_\_\_\_\_



WWW.FRIENDSOFMICHAUX.ORG  
MEMBER

\_\_\_\_\_

IS A MEMBER IN GOOD STANDING

AT THE \_\_\_\_\_ LEVEL

through \_\_\_\_\_



WWW.FRIENDSOFMICHAUX.ORG  
MEMBER

\_\_\_\_\_

IS A MEMBER IN GOOD STANDING

AT THE \_\_\_\_\_ LEVEL

through \_\_\_\_\_



WWW.FRIENDSOFMICHAUX.ORG  
MEMBER

\_\_\_\_\_

IS A MEMBER IN GOOD STANDING

AT THE \_\_\_\_\_ LEVEL

through \_\_\_\_\_



WWW.FRIENDSOFMICHAUX.ORG  
MEMBER

\_\_\_\_\_

IS A MEMBER IN GOOD STANDING

AT THE \_\_\_\_\_ LEVEL

through \_\_\_\_\_



\_\_\_\_\_, Membership Chair  
Address  
City, State ZIP

[FriendsOfMichaux.org](http://FriendsOfMichaux.org)

Date

«Prefix» «First\_Name» «Last\_Name»  
«Street\_1»  
«Street\_2»  
«City», «State» «Zip\_Code»

Dear «Salutation»:

Thank you for your generous support of the Friends of Michaux! We hope to see you at our next event on \* at \*. I think you'll find that we're a friendly group and that there is always something fun for you and your family to do in the Michaux.

Your contribution of \$«Donation\_Amount» is gratefully acknowledged. It will help so much in our projects to improve trails in the forest.

If you have any questions or ideas, please don't hesitate to get in touch with me. You can reach me via email at \* or by phone at \*.

Sincerely,

\_\_\_\_\_  
Chair/Membership Chair

The Friends of Michaux is a chapter of the Pennsylvania Parks & Forests Foundation (PPFF). PPFF is a 501(c)(3) non-profit organization, contributions to which are tax deductible to the fullest extent of the law. The official registration of PPFF may be obtained from the Pennsylvania Department of State by calling toll free within Pennsylvania 1-800-732-0999. Registration does not imply endorsement.



\*, Membership Chair  
Address  
City, State ZIP

[www.friendsofmichaux.org](http://www.friendsofmichaux.org)

September 1, 2015

«Prefix» «First\_Name» «Last\_Name»  
«Street\_1»  
«Street\_2»  
«City», «State» «Zip\_Code»

Dear «Salutation»:

Your membership in the Friends of Michaux is an important part of what makes our friends group great! In \_\_\_\_\_, with your support, we were able to:

- Do great stuff
- Do more great stuff
- Do yet more great stuff

And it can only get better! In the coming year, we'll want to do all of that great stuff and a few more things, too.

Please help by renewing your membership. You can use the enclosed form to mail in your check. To make an online payment, visit our website at ***friendsofmichaux.org*** and click on the link on our home page.

We look forward to seeing you at one of our events – or feel free to come to a regular meeting of the Friends. We meet \_\_\_\_\_. Find us on Facebook at \_\_\_\_\_.

Sincerely,

Chair Name  
Chair

The Friends of Michaux is a chapter of the Pennsylvania Parks & Forests Foundation (PPFF). PPFF is a 501(c)(3) non-profit organization, contributions to which are tax deductible to the fullest extent of the law. The official registration of PPFF may be obtained from the Pennsylvania Department of State by calling toll free within Pennsylvania 1-800-732-0999. Registration does not imply endorsement.



**FRIENDS OF MICHAUX**

☐ *New Membership*      ☐ *Membership Renewal*

NAME \_\_\_\_\_  
STREET \_\_\_\_\_  
CITY \_\_\_\_\_  
STATE \_\_\_\_\_ ZIP CODE \_\_\_\_\_  
PHONE \_\_\_\_\_  
EMAIL \_\_\_\_\_

☐ Individual - \$10  
☐ Family - \$15  
☐ Supporter - \$50  
☐ I'd like to make an Additional  
Tax Deductible Donation \$ \_\_\_\_\_  
Total Enclosed \$ \_\_\_\_\_

- ☐ I'd like to receive my newsletter via e-mail.  
☐ I am interested in volunteering.      ☐ Volunteer Category 1      ☐ Volunteer Category 2      ☐ Volunteer Category 3      ☐ Volunteer Category 4

Make check payable to PPFF (include *Friends of Michaux* on the memo line) and mail along with this form to: Friends of Michaux | Address | City, State ZIP  
*You can also join online at [www.FriendsofMichaux.org](http://www.FriendsofMichaux.org).*

The Friends of Michaux is a chapter of the Pennsylvania Parks & Forests Foundation (PPFF). PPFF is a 501(c)(3) non-profit organization, contributions to which are tax deductible to the fullest extent of the law. The official registration of PPFF may be obtained from the Pennsylvania Department of State by calling toll free within Pennsylvania 1-800-732-0999. Registration does not imply endorsement.

**FRIENDS OF MICHAUX**

☐ *New Membership*      ☐ *Membership Renewal*

NAME \_\_\_\_\_  
STREET \_\_\_\_\_  
CITY \_\_\_\_\_  
STATE \_\_\_\_\_ ZIP CODE \_\_\_\_\_  
PHONE \_\_\_\_\_  
EMAIL \_\_\_\_\_

☐ Individual - \$10  
☐ Family - \$15  
☐ Supporter - \$50  
☐ I'd like to make an Additional  
Tax Deductible Donation \$ \_\_\_\_\_  
Total Enclosed \$ \_\_\_\_\_

- ☐ I'd like to receive my newsletter via e-mail.  
☐ I am interested in volunteering.      ☐ Volunteer Category 1      ☐ Volunteer Category 2      ☐ Volunteer Category 3      ☐ Volunteer Category 4

Make check payable to PPFF (include *Friends of Michaux* on the memo line) and mail along with this form to: Friends of Michaux | Address | City, State ZIP  
*You can also join online at [www.FriendsofMichaux.org](http://www.FriendsofMichaux.org).*

The Friends of Michaux is a chapter of the Pennsylvania Parks & Forests Foundation (PPFF). PPFF is a 501(c)(3) non-profit organization, contributions to which are tax deductible to the fullest extent of the law. The official registration of PPFF may be obtained from the Pennsylvania Department of State by calling toll free within Pennsylvania 1-800-732-0999. Registration does not imply endorsement.

**FRIENDS OF MICHAUX**

☐ *New Membership*      ☐ *Membership Renewal*

NAME \_\_\_\_\_  
STREET \_\_\_\_\_  
CITY \_\_\_\_\_  
STATE \_\_\_\_\_ ZIP CODE \_\_\_\_\_  
PHONE \_\_\_\_\_  
EMAIL \_\_\_\_\_

☐ Individual - \$10  
☐ Family - \$15  
☐ Supporter - \$50  
☐ I'd like to make an Additional  
Tax Deductible Donation \$ \_\_\_\_\_  
Total Enclosed \$ \_\_\_\_\_

- ☐ I'd like to receive my newsletter via e-mail.  
☐ I am interested in volunteering.      ☐ Volunteer Category 1      ☐ Volunteer Category 2      ☐ Volunteer Category 3      ☐ Volunteer Category 4

Make check payable to PPFF (include *Friends of Michaux* on the memo line) and mail along with this form to: Friends of Michaux | Address | City, State ZIP  
*You can also join online at [www.FriendsofMichaux.org](http://www.FriendsofMichaux.org).*

The Friends of Michaux is a chapter of the Pennsylvania Parks & Forests Foundation (PPFF). PPFF is a 501(c)(3) non-profit organization, contributions to which are tax deductible to the fullest extent of the law. The official registration of PPFF may be obtained from the Pennsylvania Department of State by calling toll free within Pennsylvania 1-800-732-0999. Registration does not imply endorsement.