

MemberPlanet

The Good, The Bad, The Ugly

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Membership

What we did

- We started with 530 former members in the database
- Set up two membership levels - individual (\$5) and family (\$25)
- Included one additional new member payment - “sponsor additional memberships” (open price)
- Limited member profile to three required fields (name, email, mobile phone)
- Added one custom field: “magnet family”
- Used both online member sign up and traditional paper/cash/check sign up (manually entered into MP)

Membership

The Good

- Allows you to capture names, emails, and cell numbers.
- Allows people to pay on-line or by cash or check.
- Allows you to have multiple levels of membership, ie family or individual.
- Allows people to sponsor additional memberships.

Membership

The Bad

- Paying on-line through Memberplanet is not free. There is a flat rate fee for each transaction plus a percentage taken based on the program level chosen.
- The information gets outdated – parents no longer at the school need to be removed from the database but that is cumbersome to do.
- Child information (name, teacher and grade) are on the ‘other’ tab and do not generally get updated. This could be the School Directory if everyone was in the system and information updated. This needs to be updated by the parents. Information from the school cannot be used for this purpose.
- Maneuvering through the membership screens and sign up process is cumbersome.
- “Family” level doesn’t allow you to assign additional email addresses to those accounts.

Membership

The Ugly

- We needed to copy/paste three different email letters into MP each time we added/invited members to join - one for members who paid cash, one for parents who didn't want to join PTA but wanted to get communications, and one for members who we were inviting to join for the first time. You ALWAYS have to check the language of the last email sent.
- Download of membership database takes a long time due to the outdated infrastructure the tool uses.
- Seeing other member information requires an Admin Role which is cumbersome to assign. Excel file of paying members needs to be downloaded then go back in the system and check each member to assign the Admin Role.
- The Help information provided by Memberplanet is not very helpful. There is nothing embedded in the site. It is all on a separate site.

Communications

What We Did

- Use “Broadcast” to send reminder texts and emails to everyone in the database
- Use “Email” to send a weekly “eBlast” newsletter to everyone in database
- Use “Email” to send surveys for budget votes to Members only
- Use Mobile App for Broadcasts

Communications

The Good

- This is a powerful tool to reach out to anyone signed up in Memberplanet. This includes newsletters, emails and text messaging abilities.
- We love being able to send out a text to all families to sign up to volunteer or buy a t-shirt, tickets, etc.
- Distribution lists can be set up for volunteer groups.
- Members can opt out of text communications and unsubscribe from emails
- Mobile App makes sending urgent broadcasts very easy.

Communications

The Bad

- It can be confusing to determine when to use Broadcast vs Email.
- It is not free. There is a fee of which the amount depends on how many communications are done on a monthly basis.

Communications

The Ugly

- Broadcast does not allow you to choose specific member types (eg, paying members); emailing current members only requires working through the more cumbersome email template vs the broadcast tool.
(New info – it looks like MP has made an update and you can choose your audience with the Broadcast tool now)
- The Help information provided by Memberplanet is not very helpful. There is nothing embedded in the site. It is all on a separate site.

Fundraising

What We Did

- Used “Events” to sell tickets for fundraisers.
- Used “Donation Sites” to ‘sell’ t-shirts, dvds, and sponsorships.

Fundraising

The Good

- Allows easy online payments to be made via Credit Cards.

(not for 50/50 Raffles as this cannot be paid via Credit Card)

- Allows for multiple types of tickets to be sold per event.
- Reporting capability - who signed up, how many tickets, size of t-shirts, etc

Fundraising

The Bad

- It is not free. There are fees associated with these payments. Prices need to be set to cover these fees.
- Reports need to be downloaded for analysis; can't easily see the big picture in the tool (can only view data per page)

Fundraising

The Ugly

- The Help information provided by Memberplanet is not very helpful. There is nothing embedded in the site. It is all on a separate site.

Managing Volunteers and Surveys

What We Did

- Used “Distribution Lists” to manage volunteer groups
- Used “List Sign Up Form” to allow volunteers to sign up (or we manually entered them based on our traditional paper form)
- Sent out a “Back to School survey”
- Used surveys as polls to vote on budget amendments and nominating committee

Managing Volunteers and Surveys

The Good

- Allows to capture and easily sign up for volunteer roles.
- Allows for convenient time sensitive general membership voting such as budget amendments.

Managing Volunteers and Surveys

The Bad

- When a member completes a form without signing in, they are added to MP as a “contact”, creating a duplicative entry.
- Email communications to distribution lists is limited - the group members cannot “cc all” in response to email.
- Survey creation is not intuitive; it’s a cumbersome process.
- Requires testing/trial and error

Managing Volunteers and Surveys

The Ugly

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Financials

What We Did

- Paid for the SCPTA pro plan - \$240 per year. Includes 10,000 e-mails and 20,00 group texts per month. Transaction fee is \$.30 plus 5%.
- Used the reporting feature to analyze bank deposits and assign to correct accounts

Financials

The Good

- Deposits are set up to go directly into the PTA bank account on a periodic basis.
- Reports show good details on who has paid for items, the fees taken out for each item, and amounts deposited at the bank.

Financials

The Bad

- It is very cumbersome to switch the timing for deposits to be made. Most PTA's do weekly deposits, but to change that timing requires the entire bank set up to be done again. This includes sending a voided check to memberplanet to reset up.

Financials

The Ugly

- The Help information provided by Memberplanet is not very helpful. There is nothing embedded in the site. It is all on a separate site.

What We Would Do Now

- Start with a clean slate - don't start with last year's members
- Collect parent emails at Meet the Teacher and Open House - eg, allow parents to enter their email addresses into an Excel Spreadsheet at School, then upload to MP
- Use the same Member Plan (PRO)