CiviCRM for Membership Associations

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Jason Bertolacci
Outline

• Who Are WE?
• A Couple Examples of Customization
• Questions / Discussion
Introductions

- Lisa Rau
  - CEO and co-founder, Confluence (www.confluencecorp.com)
  - Computer Scientist
  - 20 years experience in IT / support services industry
- Ashma Shrestha
  - 6+ years as crackerjack PHP programmer / open source
  - MS in Information Systems, Virginia International University
- Jason Bertolacci
  - Interactive Marketing and Database Manager
  - International Mountain Bicycling Association
  - 15 years building solutions on open source technologies
Introductions - Confluence

• Mission:
  – To help our nonprofit clients achieve the greatest strategic value from their technology resources

• Founded 3/01
• Close to 500 clients nationwide
• Over 30 full time staff and consultants
• 95% of our work is for the nonprofit sector
CiviCRM Member

- Flexible Membership Management System
- Multiple Membership
- Online signups and renewal
- Search and list members
- Automated Renewal and Thank you message
• Constituents Management
• Membership Management
• Events management
• Basic Reporting
• Outreach
What is Unique?

- MCUA’s members are credit unions
- The employees of member credit union can register on the site
- Member Credit Union information is updated quarterly via NCUA data
  - NCUA : National Credit Union Association
MCUA

• Collect constituent information
  – Registration information
• Members Import
  – NCUA Call Report
• Memberships and Relationships
  – Affiliates and Associates
  – Chapters and Affiliates of Chapters
• Public directory
  – Affiliate Members
  – Associate Members
  – Chapters
Collect Constituent Info - Registration

**Registration Info**

- **Salutation**: [Select]
- **First Name**: [Input Field]
- **Last Name**: [Input Field]
- **Organization**: [Select]
- **Job Title**: [Input Field]
- **Training Interest**: (Select from options)
- **Role**: [Select]
- **Department**: (Select from options)
Member Import – NCUA Roll Call
MCUA Members

• Types of Membership
  – Affiliate Membership
  – Associate Membership

• Types of Relationships
  – Chapter of MCUA
  – Member (Affiliate) of Chapter
### MCUA Affiliate Member List

#### Edit Search Criteria

- **135 Results**
  - Membership Type = Affiliate Membership
  - Primary Members Only
  - Membership Status IN New or Current or Grace

#### Select Records:

- All 135 records
- Selected records only

[Print]

- **actions** -

[Go]

#### Member 1 - 50 of 135

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Start Date</th>
<th>End Date</th>
<th>Source</th>
<th>Status</th>
<th>Auto-renew?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st City Credit Union</td>
<td>Affiliate</td>
<td>December 15th, 2011</td>
<td>January 1st, 2011</td>
<td>December 31st, 2012</td>
<td>New</td>
<td></td>
</tr>
<tr>
<td>Academic Employees Credit Union</td>
<td>Affiliate Membership</td>
<td>October 15th, 1936</td>
<td>January 1st, 2011</td>
<td>December 31st, 2012</td>
<td>Compuity</td>
<td>Current</td>
</tr>
<tr>
<td>Alliance Credit Union</td>
<td>Affiliate</td>
<td>March 22nd, 1948</td>
<td>March 22nd, 1948</td>
<td>December 31st, 2012</td>
<td>Affiliate Membership</td>
<td>Current</td>
</tr>
</tbody>
</table>
MCUA Affiliate Membership form
(Admin)
Affiliate member Profile with Branches

Arsenal Credit Union

http://www.arsenalcu.org
3780 VOGEL RD
ARNOLD
Missouri
63010

Branch of Arsenal Credit Union

Arsenal Credit Union Branch 01  Arsenal Credit Union Branch 02  Arsenal Credit Union Branch 03
Arsenal Credit Union Branch 04

[Map of location]
Chapter Affiliates

Chapter Officers

Glenda Collins
Fundraising Committee
CSD Credit Union
(816)763-4020

Judy Jett
At-Large Table Officer
V P Business Development/Marketing
Central Missouri Community Credit Union

Steve Knudsen
At-Large Table Officer
President
City Credit Union
(816)252-2415

Laura Eblen
Secretary
Branch Manager
Central Missouri Community Credit Union
(816) 778-5593

Annie Karr
Vice-Chairperson
Marketing Director
Kansas City Credit Union

Tom Loftus
Registrar
Missouri Central Credit Union
(816)246-0002

Participating Credit Unions

Bayer Credit Union
8400 HAWTHORNE RD
KANSAS CITY
Missouri
http://bayercu.org/
(816)242-2133

Blue Cross Blue Shield K.C. Credit Union
2301 MAIN ST
KANSAS CITY
Missouri
(816)395-2717
Member Benefits

• Publications
• Asset Size Discount
• Services
  – Card Service
  – Checking Account
  – Discount Program
  – Financial Counselling
  – Shared Brancing
  – Student Lending
Who is IMBA?

- 501(c)3 Educational Non-profit
- 35,000 Financial Supporters
- 80,000 Email Addresses
- 180,000 Contacts
- 450 US Clubs
- A Third of IMBA’s Revenue from Individual Members
Who is IMBA?

• Land protection, recreation, children & nature and mountain biking access
• Canada, Australia, United Kingdom, Germany, Norway, Ireland, South Africa, Spain, Czech Republic, The Netherlands & the newly formed IMBA EU
• IMBA US and Canada are using CiviCRM & Drupal
IMBA US, Then…

Loose federation of clubs who are members of IMBA

Individual Members
The Collision Course

• An Individual has to purchase two memberships to be a part of the local and national organization
• We are competing for membership dollars with our own clubs
• No incentive for IMBA or club invest in each other’s growth
• No unified voice for advocating on federal issues
The Supporting Cast

[Diagram showing logos for Convio, MOVE PEOPLE™, and FileMaker]
...and IMBA US Now

- Individual Members
- Joint Membership
- IMBA Chapters
The Requirements

- Merged chapter and IMBA back-office operations
- Permissioned access to CiviCRM for chapter Admins
- Co-branded print and online collateral
- Joint membership and contribution revenue sharing
The Big Requirement

Can’t break the bank!
The New Architecture

CIVICRM

&

Drupal
You belong with us.
Supporting IMBA is the most effective way for you to build, maintain and open the trails you love to ride.

Join or renew today

JOIN IMBA!

SUPPORT IMBA
- Membership sustains IMBA.
- + Click here to Join or Renew
- Donations fuel important projects and initiatives.
- + Click here to Contribute
- Shop purchases support IMBA’s work.
- + Click here to Shop

TAKE ACTION
- Your Calls Convinced the Senate to Protect RTP Trail Funding!
- + Read this alert
- Urgent - Speak Up For Trails Today!
- + Read this alert
- Ask Your U.S. Representative to Preserve Biking and Walking
- + Read this alert

IMBA NEWS
- IMBA and Bikes Belong Benefit From Cane Creek Dealer Support
- + View news item
- 2012 Grants for IMBA Chapters and Clubs Announced
- + View news item
- IMBA and Bicycle Federation of Wisconsin Enter Unique Partnership
- + View news item

FEATURED PRODUCTS
- SOCKS - SORBA/IMBA (PRE-ORDER)
  + View product
- JERSEY - VINTAGE GOLD

To all the trails we’ve ever loved before.
Custom Data Fields

- Custom data fields on contact and contribution records to track financial and opt-in association with chapters
Groups and Permissions

- Per-chapter groups defining chapter constituents
- ACL permissions based on groups
Choose Membership

- IMBA.com/join passes chapter tagging to branded contribution page via URL
CiviCRM buildForm hook

• Populate fields via a GET url and buildForm hook – http://civicrm.org/node/562

```php
function civitracker_civicrm_buildForm( $formName, & $form ) {
    // enable tracking feature
    if ( ($formName == 'CRM_Contribute_Form_Contribution_Main' ||
        $formName == 'CRM_Contribute_Form_Contribution_Confirm' ||
        $formName == 'CRM_Contribute_Form_Contribution_ThankYou' ) &&
        $form->getVar( '_id' ) == 1 ) { // use CONTRIBUTION PAGE ID here

        // use the custom field ID and custom field label here
        $trackingFields = array(
            'custom_4' => 'Campaign',
            'custom_5' => 'Appeal',
            'custom_6' => 'Fund' );
        $form->assign( 'trackingFields', $trackingFields );
    }
}
```
The Good, the Bad and the Ugly

• Non-CiviCRM developer
• One-size-fits-most solution
• Living with your neighbor’s dirty laundry
• Tech turf
• Upgrade cycle for Drupal, CiviCRM and linux
The Pot of Gold...

• 77 Chapters
• 48 IMBA staff members
• 123 chapter admin volunteers
• 45,478 contributions
• Totaling nearly $6,000,000
• 11,587 contributions shared with chapters
• Sharing $235,035 with chapters
The Big Win

IMBA is becoming a united nationwide grass-roots organization