

# Membership Committee Conference Call

July 17, 2007

## Report from SAA Staff on New Member Database

### Overview of Membership-Related System Configurations

1. Old database retired on March 30, 2007; New database launched April 9, 2007;
2. All people and companies in database have new “SAA ID” numbers, which are used simply to identify the person or company record.
3. Every person and company has a Web Login and Web Password that is used to log into the SAA Web site. These can be customized.
4. Staff can manage records to support a variety of individual preferences, including:
  - a. Identify the bill-to address (used for dues invoices) and ship-to address (used for complimentary subscriptions to *AA* and *AO*) on dues orders.
  - b. Identify a *separate* address for the online member directory;
  - c. Hide address info from the online member directory;
  - d. Hide email address from the online member directory;
  - e. Hide a person or company entirely from the online member directory.
  - f. Members should contact SAA staff for assistance.
5. Member types are: Individual, Institutional, Associate, Student, and Not a Member
6. Multiple “fee schedules” may exist within a member type. For example:
  - a. Individual: Bridge Rate, Retired, Salary < \$20k, etc.
  - b. Associate: Domestic, International
  - c. Institutional: Regular, Sustaining
7. Dues orders (invoices) will designate the order as Renewing, New, or Reinstated, which can subsequently be used to support targeted member communications.
8. Staff is still in the process of fine-tuning certain aspects of the new system:
  - a. Web modules just launched two weeks ago; Membership Directory and committees now online; next job is to configure new membership application and dues renewal forms that interface directly with backend database. In the meantime, we have posted an interim dues renewal form that members may use to submit payment when they have received an invoice.
  - b. Need to configure new custom invoice format with:
    - i. Introductory information at beginning of output rather than at the end in the “Notes” section (see examples)
    - ii. More explicit identification of current expiration date.
  - c. Membership/Key Contact reports need to be reviewed and reconfigured.
9. After the annual meeting in Chicago, staff will start tracking roundtable membership in the new database.

### **Key Contact Reports:**

1. I have been able to export data manually from system. The attached Excel files give an idea of what kind of data we can generate and how it can be formatted.
2. The attached files are in Excel. There are several advantages of this format:
  - a. Records can be sorted by “Region” or district.
  - b. Names and addresses can be mail merged with Word, thereby eliminating the need to cut and paste Key Contact letters.
3. The attached files are broken up to distinguish new members from reinstated members from cancelled members. (Subscribers are not included.)
4. Expiration dates listed are a bit misleading. Dates in the system are recorded as the first of the month but actually represent the last day of the month. (For example, 5/1/07 would represent 5/31/07.)
5. Member types and fee schedules are not yet included.
6. Additional accuracy and contextual information could be included, including:
  - a. Ship-to name and address info.
  - b. Bill-to name and address info.
  - c. Note: The ship-to entity is the member. The bill-to is the payee. In most cases, they are identical but not always.
7. Once we agree on the desired content, staff can have our database vendor finalize a custom report procedure with the changes.

### **Dues Invoices:**

1. Memberships expire at the end of every month. Members have a one-month grace period before their membership is cancelled.
2. In the old system, staff would generate and mail dues invoices according to the following schedule:
  - a. 1st notice sent 6 weeks prior to expiration date (on the 15th of the month)
  - b. 2nd notice sent on the expiration date (on the last day of the month)
3. With the new system, staff proposes to send out notices earlier and more frequently:
  - a. 1st notice sent by mail 8-9 weeks prior to exp. date (on 1st of the month)
  - b. 2nd notice sent by email 5-6 weeks prior to exp. date (on 22nd of the month)
  - c. 3rd notice sent by mail 2 weeks prior to exp. date (on 15th of the month)
  - d. 4th final notice sent by email 1 week *after* exp. date (on 8th of the month)
  - e. If dues remain unpaid, member would be cancelled 3 weeks later.

**Sample of "Proforma" Dues Invoice (mailed notice) sent as PDF attachment.**

**Sample of "Proforma" Dues Invoice (Email notice):**

-----Original Message-----

From: bdoyle@archivists.org [mailto:bdoyle@archivists.org]  
Sent: Tuesday, July 17, 2007 10:43 AM  
To: Brian Doyle  
Subject: Invoice PRO-0058724 7/17/2007

Society of American Archivists  
527 South Wells Street, 5th Floor  
Chicago, IL 60607  
www.archivists.org

INVOICE #: PRO-0058724  
BALANCE DUE: \$180.00  
STATUS: Unpaid  
DATE PROCESSED: 7/2/2007  
TERMS: Net 30  
ORDER TAKEN BY:

BILL TO:  
Megan E Phillips  
822 Corinthian Avenue  
Philadelphia PA 19130

SHIP TO:  
Megan E Phillips  
822 Corinthian Avenue  
Philadelphia PA 19130

REMIT TO:  
Society of American Archivists  
527 South Wells Street  
5th Floor  
Chicago IL 60607  
Phone: (312) 922-0140  
Fax: (312) 347-1452

1 Renew Full Membership 9/1/2007 - 8/31/2008 at \$180.00 each: Total = \$180.00

1 American Archivist Subscription 9/1/2007 - 8/31/2008 at \$0.00 each: Total = \$0.00

1 Archival Outlook Subscription 9/1/2007 - 8/31/2008 at \$0.00 each: Total = \$0.00

1 Electronic Records Section 9/1/2007 - 9/29/2008 at \$0.00 each: Total = \$0.00

1 Government Records Section 9/1/2007 - 9/29/2008 at \$0.00 each:  
Total = \$0.00

Invoice Subtotal: \$180.00  
6 % Tax: \$0.00  
InvoiceTotal: \$180.00  
Additional Discount: \$0.00  
Received to Date: \$0.00  
BALANCE DUE: \$180.00

Notes:

Thank you for your membership in the Society of American Archivists!  
Your membership is now up for renewal. If you wish to renew your  
membership with a credit card, you may do so online at  
<http://www.archivists.org/forms/duesRenewal.asp>. This form will also  
allow you to submit changes to your address, membership category,  
and/or section memberships. You may also use the form to make  
contribution to one or more of SAA's special funds.

You will also receive a copy of this invoice in the mail.

If you have any questions or concerns, please contact SAA staff at  
312/922-0140 or via email at [membership@archivists.org](mailto:membership@archivists.org).