

Memberships, Rank and File: how to recruit and steward members

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The Sage Gateshead

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Over 1,500 ticketed events a
year

Over 400 performances

Over 120,000 participants in our
Join In programme

Our membership schemes

Individual Giving

Northern Sinfonia Friends

Sage Supporters

Principal Partners

Corporate Partners

Memberships

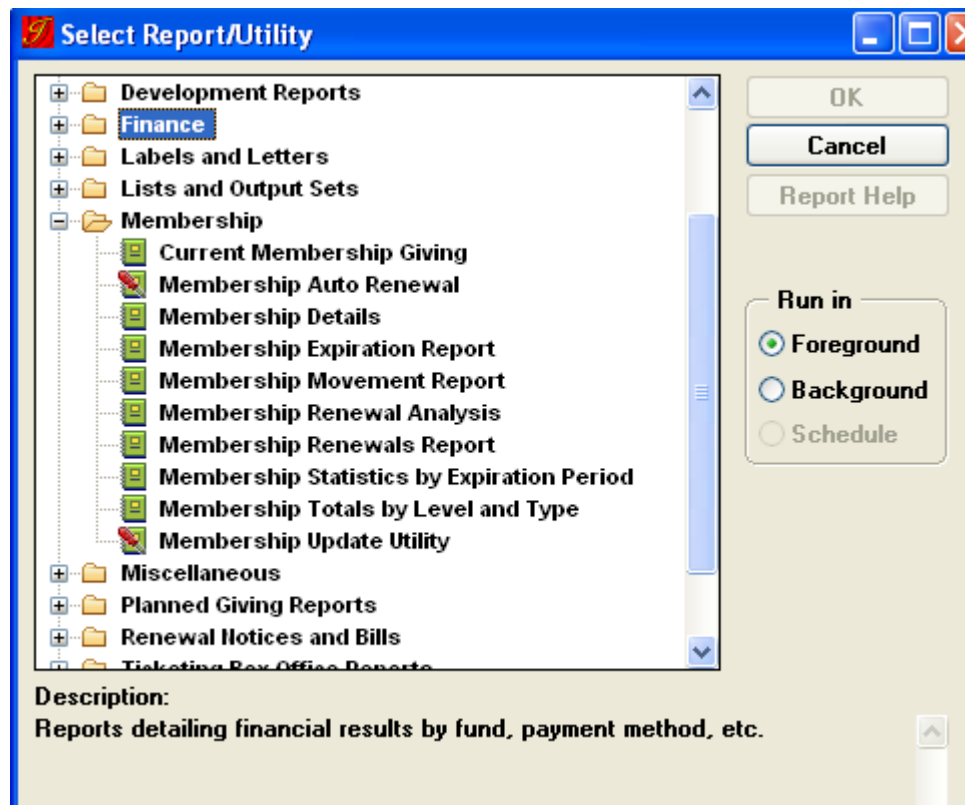
Membership Organizations

Name: Corporate Partners
Ctrl Grp: North Music Trust
Retroactive Upgrades: <input checked="" type="checkbox"/>
Deactivate on Adjustment: <input checked="" type="checkbox"/>
Name: CP - DO NOT USE
Ctrl Grp: North Music Trust
Retroactive Upgrades: <input checked="" type="checkbox"/>
Deactivate on Adjustment: <input type="checkbox"/>
Name: Individual Giving
Ctrl Grp: North Music Trust
Re (none)
Deactiv Acorn Attribute viewers
Name: North Music Trust
Ctrl Grp: Northern Sinfonia Trust
Re
Deactiv
Name:
Ctrl Grp: Northern Sinfonia Trust
Retroactive Upgrades: <input checked="" type="checkbox"/>
Deactivate on Adjustment: <input checked="" type="checkbox"/>

Associated Membership Levels

Level: IG3	Category: Sage Supporter L3	Suspend: 3	<i>Months After Initiation</i>
Description: Sage Supporter L3	Cancel: 6	<i>Months After Initiation</i>	
Rank: 1	Initiation: <input checked="" type="radio"/> First of Next Month	Expire: 12	<i>Months After Initiation</i>
Start Amt: £150.00	<input type="radio"/> Today	Renew: 3	<i>Months Before Expiration</i>
End Amt: £1,999.99	<input type="radio"/> First of This Month	Lapse: 1	<i>Months After Expiration</i>
Basis Amt: £12.00	Goods/Services: £.00	Reinstate: 60	<i>Months After Expiration</i>
No. Issues:	Constituency: Sage Supporter	<input type="checkbox"/> Inactive	
Level: IG2	Category: Sage Supporter L2	Suspend: 3	<i>Months After Initiation</i>
Description: Sage Supporter L2	Cancel: 6	<i>Months After Initiation</i>	
Rank: 2	Initiation: <input checked="" type="radio"/> First of Next Month	Expire: 12	<i>Months After Initiation</i>
Start Amt: £60.00	<input type="radio"/> Today	Renew: 3	<i>Months Before Expiration</i>
End Amt: £149.99	<input type="radio"/> First of This Month	Lapse: 1	<i>Months After Expiration</i>
Basis Amt: £5.00	Goods/Services: £.00	Reinstate: 60	<i>Months After Expiration</i>
No. Issues:	Constituency: Sage Supporter	<input type="checkbox"/> Inactive	
Level: IG1	Category: Sage Supporter L1	Suspend: 3	<i>Months After Initiation</i>
Description: Sage Supporter L1	Cancel: 6	<i>Months After Initiation</i>	
Rank: 3	Initiation: <input checked="" type="radio"/> First of Next Month	Expire: 12	<i>Months After Initiation</i>
Start Amt: £40.00	<input type="radio"/> Today	Renew: 3	<i>Months Before Expiration</i>
End Amt: £59.99	<input type="radio"/> First of This Month	Lapse: 1	<i>Months After Expiration</i>
Basis Amt: £3.33	Goods/Services: £.00	Reinstate: 60	<i>Months After Expiration</i>
No. Issues:	Constituency: Sage Supporter	<input type="checkbox"/> Inactive	

There are a host of canned reports allowing you to track memberships



Memberships trigger constituencies
and can be used for ranking

Make building lists easy

But ...

not everyone is a joiner

Non membership donors

Regular giving scheme

Online donations

Ticket top ups

Memberships

Membership Organizations

Name: Corporate Partners Ctrl Grp: North Music Trust Retroactive Upgrades: <input checked="" type="checkbox"/> Deactivate on Adjustment: <input checked="" type="checkbox"/>
Name: CP - DO NOT USE Ctrl Grp: North Music Trust Retroactive Upgrades: <input checked="" type="checkbox"/> Deactivate on Adjustment: <input type="checkbox"/>
Name: Individual Giving Ctrl Grp: North Music Trust Retroactive Upgrades: <input checked="" type="checkbox"/> Deactivate on Adjustment: <input checked="" type="checkbox"/>
Name: Misc Donors Ctrl Grp: North Music Trust Retroactive Upgrades: <input checked="" type="checkbox"/> Deactivate on Adjustment: <input checked="" type="checkbox"/>
Name: Northern Sinfonia Friends Ctrl Grp: Northern Sinfonia Trust Retroactive Upgrades: <input checked="" type="checkbox"/> Deactivate on Adjustment: <input checked="" type="checkbox"/>

Associated Membership Levels

Level: MD4 Category: Misc Donor L4 Description: Misc Donor L4 Rank: 1 Initiation: <input type="radio"/> First of Next Month <input type="radio"/> Today <input type="radio"/> First of This Month <input type="radio"/> Fixed Date 00/00/0000 Start Amt: £500.00 End Amt: £10,999.99 Basis Amt: £.00 Goods/Services: £.00 No. Issues: Constituency: Misc Donor	Suspend: 1 <i>Months After Initiation</i> Cancel: 1 <i>Months After Initiation</i> Expire: 12 <i>Months After Initiation</i> Renew: 1 <i>Months Before Expirat</i> Lapse: 2 <i>Months After Expiratic</i> Reinstate: 2 <i>Months After Expiratic</i> <input type="checkbox"/> Inactive
Level: MD3 Category: Misc Donor L3 Description: Misc DOnor L3 Rank: 2 Initiation: <input type="radio"/> First of Next Month <input checked="" type="radio"/> Today <input type="radio"/> First of This Month <input type="radio"/> Fixed Date 00/00/0000 Start Amt: £150.00 End Amt: £499.99 Basis Amt: £.00 Goods/Services: £.00 No. Issues: Constituency: Misc Donor	Suspend: 1 <i>Months After Initiation</i> Cancel: 1 <i>Months After Initiation</i> Expire: 12 <i>Months After Initiation</i> Renew: 1 <i>Months Before Expirat</i> Lapse: 2 <i>Months After Expiratic</i> Reinstate: 2 <i>Months After Expiratic</i> <input type="checkbox"/> Inactive
Level: MD2 Category: Misc Donor L2 Description: Misc Donor L2 Rank: 3 Initiation: <input checked="" type="radio"/> First of Next Month <input type="radio"/> Today <input type="radio"/> First of This Month <input type="radio"/> Fixed Date 00/00/0000 Start Amt: £60.00 End Amt: £149.99	Suspend: 1 <i>Months After Initiation</i> Cancel: 1 <i>Months After Initiation</i> Expire: 12 <i>Months After Initiation</i> Renew: 1 <i>Months Before Expirat</i> Lapse: 2 <i>Months After Expiratic</i>

Tessitura 62 Live Server - Version 10.0.0.1

File GoTo Campaigns Tools Window Help



Campaigns-D12/13 Annual Campaigns (indv)

Name: D12/13 Annual Campaigns (indv) **Control Group:** (none)

Goal: £15,000.00 **Memb Org:** Misc Donors **Gift:** £37,646.52 **Single Open Pledge:**

Start Date: 01/04/2012 **Contacts Attempted:** 147 **Pledge:** £150.00 **Match Memb:**

End Date: 31/03/2013 **% Successful:** 4736.0544% **Pledge Payment:** £62.50 **Auto-Restrict Conts Before Start Date:**

Status: Active **Days Left In Campaign:** 144 **Pledge Balance:** £87.50 **Min Pldg Pmt:** £.00

Category: (none) **FYear:** 2012 **Ticket Income:** £0.00

Notes:

Campaign No: 483 **Created:** 08/03/2012 **By:** kleadbet **Last Updated:** 27/03/2012 **By:** kleadbet

[Funds](#) | [Expenses](#) | [Revenue Graphs](#) | [Summary Reports](#) | [Designations](#) | [Custom](#)

- Enter Fund**
- Arches Contributions
 - Corporate Partner Annual Fund
 - Corporate Sponsorship
 - Endowment Dummy Fund
 - Endowment Fund @ TSG
 - Fundraising Events NMT
 - NSF Annual
 - Patrons Annual
 - Principal Partners Fund
 - Sage Supporters
 - T&F NMT Fund
 - T&F NST Fund
 - Ticketing Direct Debit Pledges
 - 0809 Cornerstone
-

Associated Funds

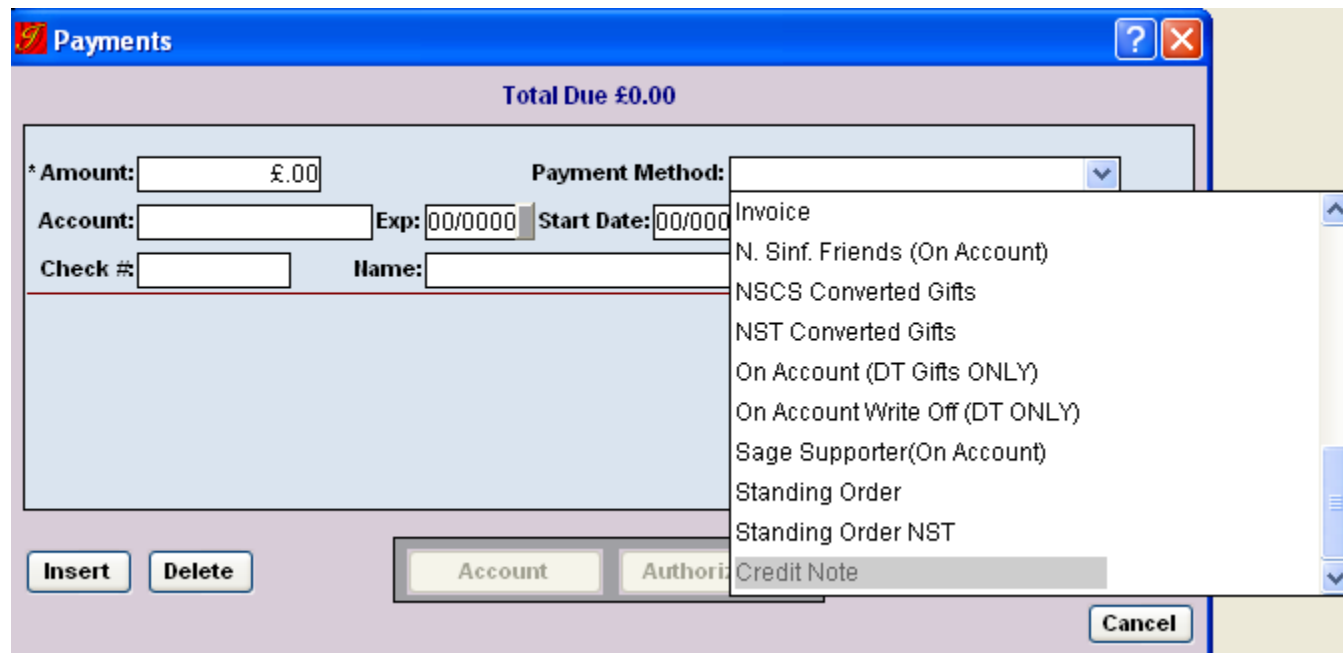
Fund	Start Date	End Date
Cornerstone Donors Fund	01/04/2012	31/03/2013
Legacy Gifts	01/04/2012	31/03/2013
NMT Misc Donations	01/04/2012	31/03/2013
NST Misc Donations	01/04/2012	31/03/2013
Onsite Donation Boxes	01/04/2012	31/03/2013
Ticket Top Ups	01/04/2012	31/03/2013

So anyone making a donation
becomes a member in Tessitura

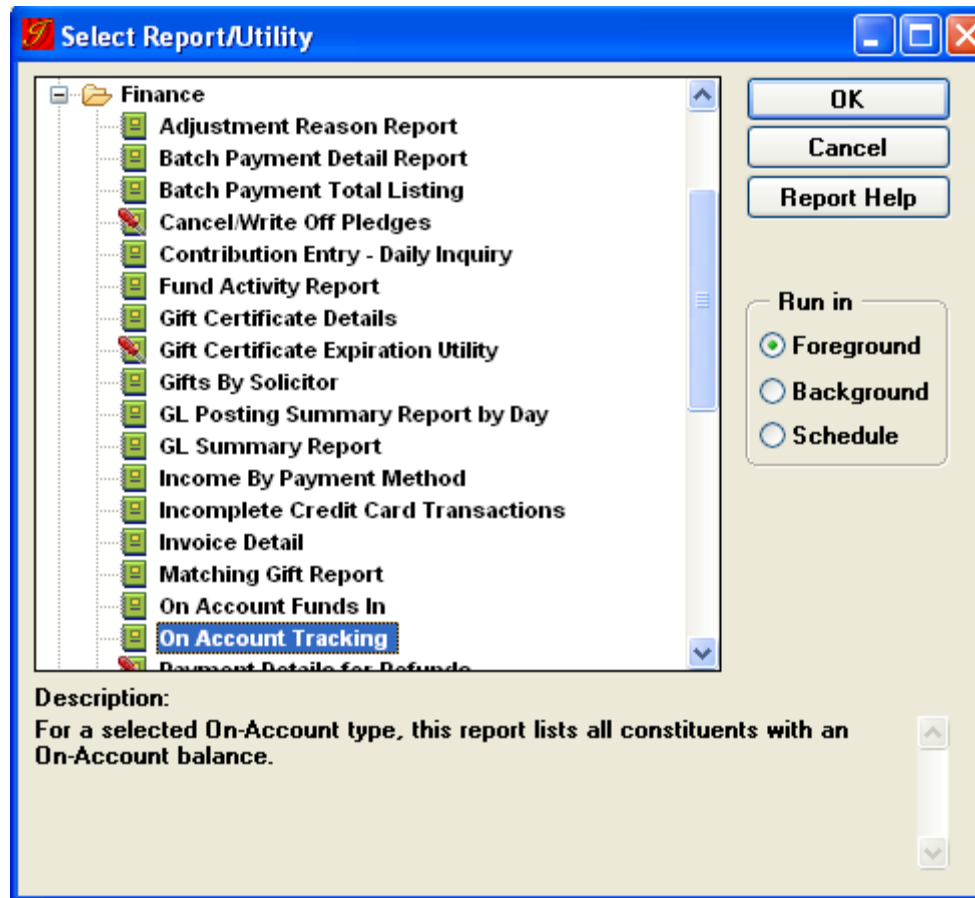
Making it easier to become a member

... Increasing the channels for membership sales

Ticket office use dedicated On Account Payment method



The screenshot shows the 'Payments' window in Sage software. The title bar reads 'Payments' and the status bar shows 'Total Due £0.00'. The main form area contains several input fields: '* Amount:' with a value of '£.00', 'Account:', 'Exp:' with '00/0000', 'Start Date:' with '00/0000', 'Check #:', and 'Name:'. A 'Payment Method:' dropdown menu is open, displaying a list of options: Invoice, N. Sinf. Friends (On Account), NSCS Converted Gifts, NST Converted Gifts, On Account (DT Gifts ONLY), On Account Write Off (DT ONLY), Sage Supporter(On Account), Standing Order, Standing Order NST, and Credit Note. At the bottom of the window, there are buttons for 'Insert', 'Delete', 'Account', 'Authori', and 'Cancel'.



The Sage Gateshead

On Account Tracking Report

kleadbet

07/11/2012 05:33 PM

Page 1 of 1

On Account Types: N. Sinf. Friends (On Account);On Account (DT Gifts ONLY);Sage Supporter(On Account)

Payment Cut Off Date:

List:

<u>On Account Type</u>	<u>Const ID</u>	<u>Name</u>	<u>Amount On Account</u>
II. Sinf. Friends (On Account)			
	10186717	Mrs J. Moxham	£38.50
	104745	Lady E. Rawlins	£58.00
Subtotal	2		£96.50
Grand Totals	2		£96.50

File GoTo Constituents Tools Window Help

Constituents - Mrs J Moxham

ID: **10186717** DPA - Last Asked: **30/10/2012** Total Lifetime Last Perf. Dt: **??/01/1930 00:00** User ID: **kleadbet**
 Name: **Mrs J Moxham** Member Level: Donations: Batch: **31014**
 Const: Memb. Expiration: Next Perf. Dt: **??/01/1930 00:00** **fault Batch Type**
 On Account (Devo): **£0.00** Entered: **17/12/2004**

General Names Addresses Constituencies Associations Research Attributes

III:	Prefix	First Name	Middle Name	Last Name	Suffix	Gender	Status
III1:	Mrs	J		Moxham		Female	
III2:							

The Sage Gateshead

Payments Total Due **£0.00**

* Amount: Payment Method:

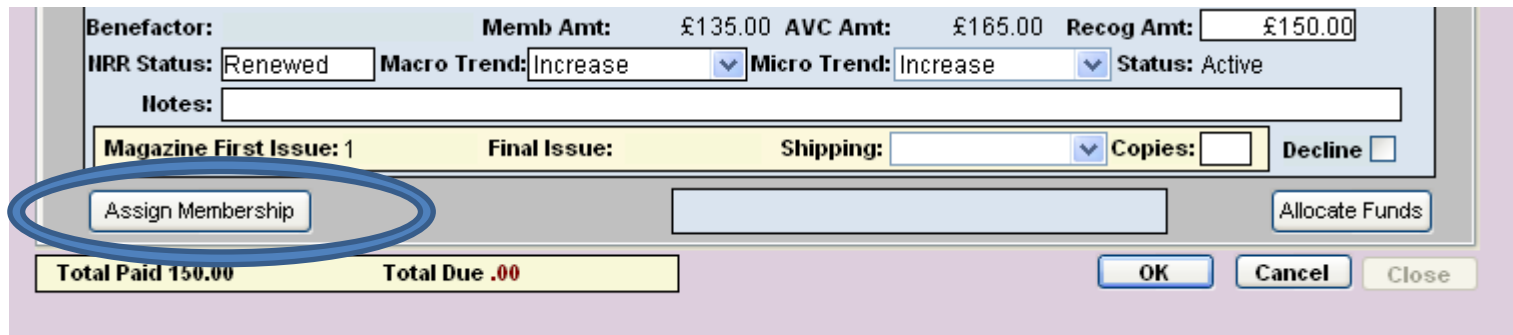
Account: Exp: Start Date:

Check #: Name:

Insert Delete Account Authori

Cancel

Selling Gift Memberships



Benefactor: Memb Amt: £135.00 AVC Amt: £165.00 Recog Amt: £150.00

HIRR Status: Renewed Macro Trend: Increase Micro Trend: Increase Status: Active

Notes: _____

Magazine First Issue: 1 Final Issue: Shipping: Copies: Decline

Assign Membership Allocate Funds

Total Paid 150.00 Total Due .00 OK Cancel Close

Payments ? X

Total Due £0.00

* Amount: £150.00 Payment Method:

Account: Exp: 00/0000 Start Date: 00/0000

Check #: Name:

- Cash
- Cheque
- Gift Certificate(Sage Supp)
- Mastercard
- "On Account" Write Off
- Corporate Allocation
- Development Invoice
- DV Bank Draft
- DV Bank Transfer