

October 26, 2023

# LWV and ClubExpress

What this means for Local and State Leagues using or considering ClubExpress



# POP

- **Purpose:** Disseminate information about the system selection process and what this means for local and state Leagues that are currently using, or considering adopting, ClubExpress.
- **Outcome:** Enable local and state League leaders to communicate the relevant information to their Leagues, and support Leagues in making decisions around the tools they choose.
- **Process:** Provide an overview of the selection process so far, summarize how ClubExpress will fit into the future state, and allow time for participant questions.

# Purpose of the New System

- A consistent and aligned membership system across all levels of League that will eliminate financial barriers to participation, create an equitable division of dues between levels of the League, and overall, simplify mechanics of joining the League.

# What we need the system to do

- Provide one membership portal where members can join from each level website via the same method
- Transmit member information and funds to each level as quickly as possible
- Allow for a pay-what-you-can dues model

# Relationship to Salesforce

- To clarify, Salesforce is the CRM (customer relationship management) where data is housed
- Looking for a platform to be the front-end interface for members to join and renew, that will send data into Salesforce

# How the search was conducted

- A technology consultant identified the League's requirements and possible platforms that could meet them
- LWVUS and members from multiple state and local Leagues participated in product demos to learn about three potential platforms
- Participants discussed the pros and cons of each platform and how they would meet the stated requirements, as well as the overall needs of Leagues

# Why not ClubExpress?

- With Salesforce as our database of record, we needed a platform that would easily transmit data to Salesforce.
- ClubExpress is a standalone product that can transmit data, but as users know, it is built as a tool to both house and use the data.

# Overview of Timeline

- ChapterSpot was chosen in September 2023 as the new front-end membership platform to integrate to Salesforce
- Current plan is to train and launch between November 2024 after the election and February 2025
- Will be setting up and collecting information from Leagues between now and then



# Membership Portal

- New members will now join and renew via ChapterSpot at the LWWUS level
- The link to join will be able to be added to existing websites
- LWWUS and ChapterSpot will provide support on this function

# Additional Tools

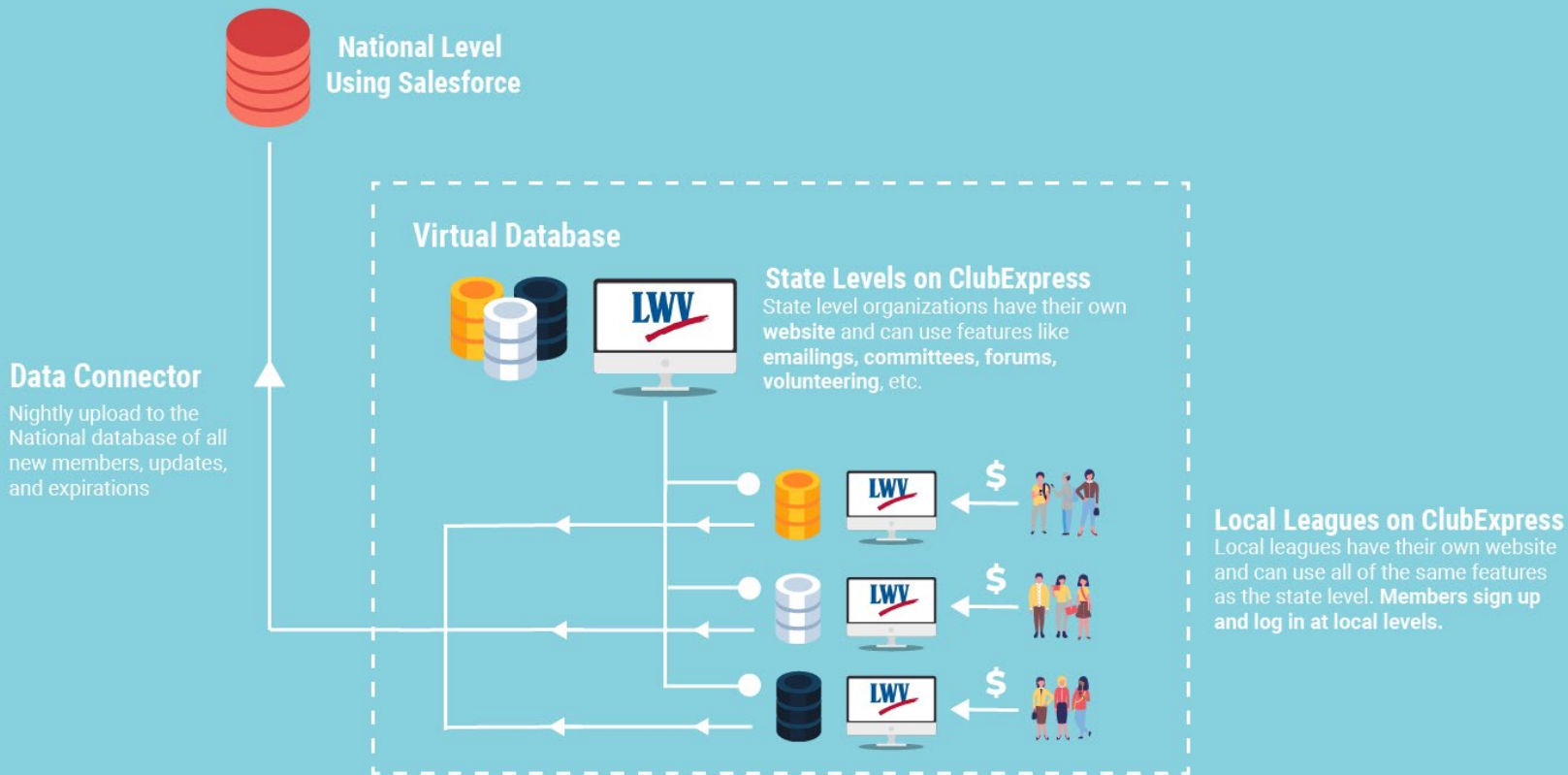
- Only the membership component will need to move away from ClubExpress and be used in the new system
- Other tools (website, mailings, etc.) can still be on ClubExpress
- ChapterSpot will offer basic website and mailing functionality that are more template-based

# What Stays at the ClubExpress Level

- Local League and State organization websites
  - Public site to promote local and state initiatives
- Member login to view member-only content
- Discussion Forums
- Committees, Member Interest Groups, Blogs, News/Articles, Documents, Photos, etc.
- Event Calendar with online registration and payment
- Donations
- Mobile app, channels, direct messaging, etc.
- Admin functions, including Blast Emailings and Text Messaging
  - Reporting and data exports

# ClubExpress Data Connector

- ClubExpress built a Data Connector to move member data (new members, updates, renewals, expirations) on a nightly basis from the local League's website up to Salesforce
- Under the new model, we will rebuild the Data Connector to work in the opposite direction!
  - Local Leagues running on ClubExpress will always have current data
  - New members will still receive an email from ClubExpress with username/password; can still be customized
  - States running ClubExpress will also have current data from the Leagues within the state
  - Local Leagues can still collect unique information when member logs in.





## National Level on Salesforce

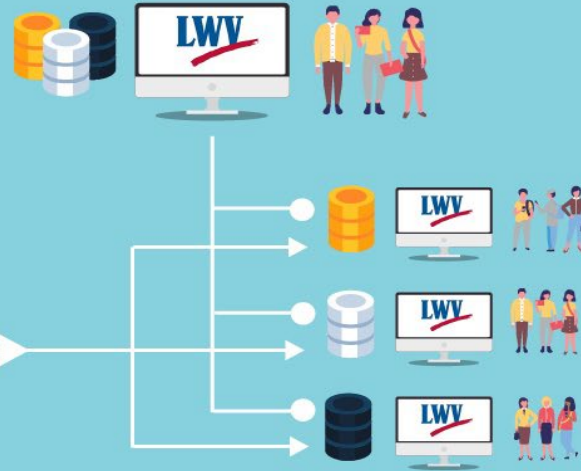
Members join and renew at this level. Membership database updates are shared nightly with local Leagues via the "Data Connector".

## State Levels on ClubExpress

State level organizations have their own website and can use features like emailings, committees, forums, volunteering, etc.

Data Connector

## Virtual Database



## Local Leagues on ClubExpress

Local leagues have their own website and can use all of the same features as the state level. Members can log in to their local leagues.

# ClubExpress Multi-Tier Functionality

- Under the new League model, more resources are provided to states to work with local Leagues on statewide initiatives
- ClubExpress already supports this:
  - Separate state and local League websites
  - Virtual database of members and non-members at the state level comprising local League databases (plus state-level members and non-members)
  - Members can log into their local and state websites
  - Serve on committees, participate in forums, share documents, register for events at the state level, etc.
  - States can email or text all members and non-members within the state
  - Content Syndication!

# Content Syndication

- State creates content that is automatically shared with each local League in that state running on ClubExpress
  - Blogs
  - News/Article postings
  - Document folders and sub-folders and the documents within them
  - Custom web pages
  - Home page content
  - Events (shared in both directions)
    - Local League events on the state calendar
    - State events on each local League calendar



# Questions-1

*Will the Club Express user interface and process for joining and/or renewing look the same to members/potential members after the implementation? Sometimes this interface is used by the individual who is joining or renewing; other times it is used by a Local League staff or volunteer who enters a person's information based on a paper join/renewal form.*

This interface will no longer be used. Signing up and renewing will happen at the national level through ChapterSpot, including League staff/volunteers entering a person manually.

Member information will be updated at the local and state levels through the new “reverse” Data Connector.

Any “Join” option at the local or state level will jump to ChapterSpot.

# Questions-2

*How will the Local League know when a member has joined/renewed? What will be the lag/processing time at LWVUS before the local League is aware of the join/renewal?*

Local Leagues will receive an email from ChapterSpot.

The Data Connector will run on a nightly basis to update local and state databases with this information. It can also trigger welcome emails from the local or state level to new or renewing members. These emails can still be customized.

# Questions-3

*Will the interface still be able to capture information that is important to local leagues such as “interests” and demographic information?*

ChapterSpot can be configured to capture special information such as member interests.

When new members log into their local League website running on ClubExpress, we can also capture information that is unique to that local League.

# Questions-4

*How will current renewal dates be affected by the change?*

Members will be prompted to renew a year from their most recent renewal date. For Leagues that are already on a rolling renewal schedule, nothing is expected to change on this front. For Leagues where everyone joins on the same date, they will be prompted to join on that date again, but new members will join throughout the year and retain membership for a year following joining.

# Questions-5

*What will be the process for individuals who want to mail a check or who have a check sent from an investment account? Will they continue to send to the local League?*

This depends on how the dues flow will be set up, which is still being determined. Checks will either go to the local League or to a 3rd-party lockbox.

LWVUS is aware that many workflows currently happen offline and this will be factored into all planning.

# Questions-6

*How will the implementation timeline be communicated; how will Leagues be selected for implementation?*

The timeline will be posted on the League Management Site and presented at upcoming Framing the Future office hours. Leagues will launch at the same time, currently estimated to be January 2025. Leagues that will be involved in the testing beforehand have yet to be identified, but it will likely be a question of selecting a variety of Leagues (taking into account size, geography, and current League setup) and factoring in League availability.

# Questions-7

*Current rosters on LWWUS are still problematic for local leagues. Will this change eliminate the need for local leagues not on ClubExpress (thus don't have access to the Data Connector) to enter data into the LWWUS systems?*

This change will eliminate the need for local Leagues to enter data into the Roster Manager portal. In cases where an individual joins offline, the local League will need to enter their information into ChapterSpot.

On implementation, local Leagues will still have the ability to review and update local roster information.

# Questions-8

*Who will provide tech support for the join/renew function? CE or LWWVUS?*

LWWVUS in conjunction with ChapterSpot will provide support for the Join / Renew function running at the national level.

ClubExpress will continue to provide support for local Leagues and state organizations running their local websites and databases on ClubExpress.



# Questions-9

*Please clarify how billing and PMP payment will “work” during the implementation period. Do LL have to be concerned with cash flow problems, e.g., between current annual PMP billing and rolling expirations? What is the impact on Leagues who have been using the Funds Connector vs. those Leagues that never opted in?*

A PMP invoice for FY25 will be sent out in July/August 2024 as usual. After launch, one more PMP invoice will be issued that covers members who joined between 2/1/24 and launch. Understanding that this could be a cash flow concern for Leagues, we are considering how to alleviate this problem, perhaps by extending the deadline for the final PMP invoice. For Leagues who have been using the Funds Connector, this should not be an issue – they have already gone through the transition from delayed to real-time payment.

# Questions-10

*How will LWVUS manage the accounting and letters of acknowledgement/ thank-yous for different tax structures 501(3)c vs. 501(4)c within and among Local Leagues?*

The accounting side depends on how the dues will flow, and this will be communicated when it is officially determined. The confirmation emails should be able to include the breakdown (e.g. this amount went to this level which is a 501(c)(3), this amount went to this level which is a 501(c)(4), etc.).

# Questions-11

*Will Club Express pricing be affected by these changes? Will Tech Support?*

ClubExpress pricing and support for local League and state websites and databases will not change.

# Questions-12

*How will membership history be recorded in ClubExpress, will the transaction and payment fields become obsolete with regard to membership transactions (and we just see donations there?) For example renewal dates, extra donations at time of renewal, membership level (are they a big donor or a minimum donor?)*

With the new model, membership signup and renewal transactions and payments will no longer be shown in ClubExpress. Members will be able to get this information from ChapterSpot.

Event registration, donation, and volunteering history, including transactions and payments, will still be shown in ClubExpress.

# Questions-13

*Under the new model, what will be the “system of record”?*

ChapterSpot and Salesforce will be the system of record for member status, contact information, and payment history.

The new Data Connector will ensure that any updates that happen at the top level are communicated down to local Leagues and state organizations. Your local ClubExpress database will be subordinate to ChapterSpot and Salesforce.

# Further Questions?

# Going Forward

- Please reach out to [info@clubexpress.com](mailto:info@clubexpress.com) or [membership@lwv.org](mailto:membership@lwv.org) with any questions
- Next Framing the Future office hours: Wednesday, November 15<sup>th</sup>, 4pm ET