

## Local League Planning

### for LWV Membership Transformation 2025

As you know, the League of Women Voters of the United States has engaged ChapterSpot to create a membership dues processing platform for all levels of League that will interface with the national League's Salesforce member database. The FAQ for this project is at <https://www.lwv.org/league-management/membership/lwv-new-membership-system-faqs>. Every local League should have a person signed up as the official contact for the new system. If your League does not have a point of contact identified, this should be added on the roster.

The following are some items that might require action by a local League in preparation for the January/February 2025 transition to the new national membership system, and for ongoing support after the implementation. The current cut-over date is the end of January 2025, subject to change.

There are a number of things to think about and to act on before the new cutover. Here's a non-comprehensive planning list, in no particular order:

1. **Inform your League's membership**
2. **Plan for Training Time & Follow-up**
3. **Set up for Handling Dues**
4. **Review your Renewals Timing**
5. **Review how to do Donations with Dues**
6. **Review/Revise your Budget**
7. **Review/Revise your Bylaws**
8. **Prepare for Auto-Renewal**
9. **Decide about Student Memberships**
10. **Prepare your Website Changes**
11. **Prepare for Maintaining Local Member Information Files**

1. **Inform your League's membership:** Your current members should be informed and educated about the change in their renewal process and how they will interact with it.
  - a. You should start explaining to your membership that a change in the way they pay dues (and possibly how they make donations) is coming at the beginning of 2025. If you're not familiar, start here: at <https://www.lwv.org/league-management/membership/lwv-new-membership-system-faqs>.
  - b. Although most members will not need to renew their memberships for many months after the January/February 2025 cutover date, **every current member of the League of Women Voters (in the Salesforce database) who has an email address will receive an email in January 2025 directing them to sign in and update their data in the National database**, even though their

membership is not yet up for renewal.

Local Leagues should:

- i. Alert our members to be watching for this email, and
  - ii. provide some guidance about what to do when they get that email
- c. **Alert your Household/Associate and Student members that a dues bill will be coming:** Do you currently send renewal notices to Associate/Household or Student members, or only to the Primary member in a household? If only to the Primary, that is about to change. Although renewals will not happen all at once, change of member status will happen in January 2025 to all Household/Associate and Student members. That's because there will no longer be any of those member types after January. The new system will automatically change them into regular members. Then, when their memberships next expire, they will receive an email renewal notice. When the Primary member in their household receives their renewal notice, they will have the option to renew on behalf of another member in their household as well, so your current Household/Additional members may not need to respond to their renewal notices, but they should be aware that they are coming and that they have the option to renew on their own.
- d. At <https://www.lwv.org/league-management/membership/chapterspot-resources>, in the section headed "Communicating with Members" you can find samples of things you might include in member newsletters.
- e. Members who usually renew by check will need extra attention. Starting in February 2025, renewal dues checks must be **made out to LWVUS** but sent to your local League. Training for what the local League should do with these checks will be included in overall system training in November/December.

## 2. Plan for Training Time & Follow-up

- a. **Training for League officers** about the system will be required in the **November/December 2024** timeframe.
  - i. Between mid-November and mid-December League Officers and many Committee Chairs will need to attend online training sessions, and there will be some setup tasks required of each League based on that training. Be sure your Board and appropriate Committee Chairs are aware. The training schedule will be emailed to each League's point of contact and posted on the [ChapterSpot Resources page](#).

## 3. Set up for Handling Dues: The way you handle dues is about to undergo significant changes.

- a. Before December 2024 each local League must **establish an account with Stripe** to receive your dues payment via ChapterSpot. Stripe is a payment processor, similar to PayPal, and it is the mechanism by which your League will receive member dues. Directions on how to set up Stripe will be emailed to your League's point of contact and included in training.
- b. **New Procedure for Dues Renewals paid by Check:** The procedure for members who wish to pay their dues by check will be:

- i. The member must write out their check to **LWVUS** (NOT the local League), and give the check to the local League representative (probably the Treasurer?)
    - ii. The Local League must collect and forward the dues check(s), with appropriate information to a Lockbox, address to be announced.
    - iii. New members joining through the LWVUS website will not be given the option to pay by check as LWVUS has stated that they wish to discourage the use of checks. If your members wish to pay by check, you will need to communicate with them to collect their checks.
  - c. **Chasing members who are late to renew:** Be prepared to learn how to track late renewals in the new system, since this will still be the responsibility of the local League. Email auto-reminders will be sent by the new system, including notification that a person's membership has expired after the annual renewal date. Personal contact will be up to the local League.
4. **Rolling Renewals:** Do you currently collect dues once a year in a big renewal drive? The new national system is a '**rolling renewals**' system. That won't affect your current members - they keep their current renewal date - but it will affect every future member's renewal date, and how often your membership team has to follow up on late renewals. Rolling Renewals means that, after January 2025, the anniversary of the day you join becomes your annual renewal date.

So, **if your League is not currently using rolling renewals**, a review and some modification of your membership renewal policies and procedures may be needed, as well as probable changes to your Bylaws. The training sessions in November/December 2024 will provide information on how your Membership Chair will be notified that intervention is needed to get their renewal completed.

5. **Review how to do Donations along with Dues:** If you currently collect donations at the same time as dues, your method of collection will probably need to be examined and revised:
  - a. **Local League Donations at Join/Renew:** On the LWVUS **ChapterSpot** collection page there will be an opportunity for those joining and renewing online to specify a donation to a local League. At the time of launch, members can only make additional donations to the same Stripe account through which your League is collecting dues (e.g. it will not be possible to collect dues through a 501(c)(4) and donations through a 501(c)(3)).
  - b. **Auto-donations with auto-renewals:**
    - i. The checkbox for membership auto-renewal is separate from the checkbox for donation auto-renewals. Which is to say, a member who chooses to auto-renew their membership may choose to make just a one-time donation, which is something to consider when budgeting.
  - c. **No bundled Membership 'Levels'**
    - i. If your League uses "Levels" of membership that combine a basic membership fee with a donation (e.g. the \$150 "Susan B. Anthony Membership Level"), note that the new system will not 'bundle' donations with dues into pre-packaged 'levels' of membership.

If your League does not do that, no worries. If you do, your League will need to plan other ways to obtain those donations from your members. This could also affect the timing of your cash flow.

6. **Review/Revise your Budget:** Take a good look at your League's budget from January 2025 through at least June 2027. There is a discussion about this at <https://www.lwv.org/sites/default/files/2024-03/Budgeting%20Guidance%20v2.pdf>. Cash flow in from dues and out to PMP will be changing in many ways.
  - a. **Note that:** PMP payments to National and State will still need to be **made in 2025** for **2024** dues collected, even though we'll have moved to a new dues model as of February 2025. (see discussion of PMP Timeline at <https://www.lwv.org/league-management/membership/chapterspot-resources>)
  - b. **You may still need to pay some other PMPs:** While the equivalent of the old PMP for National and State will be taken out before your local League sees your share of dues, if there are other levels (ILO's) to which you currently pay PMP (like a County or Regional League) you will still need to pay those amounts annually **out of your local portion of dues**. Check with your ILO(s) to see if they plan any changes, including the fact that there will no longer be 'Associate' member types.
7. **Review/Revise your Bylaws:** Many of the changes being made could affect clauses in your League Bylaws. There's a document discussing this at: [https://www.lwv.org/sites/default/files/2024-02/Bylaws%20Guidance\\_0.pdf](https://www.lwv.org/sites/default/files/2024-02/Bylaws%20Guidance_0.pdf).

After you've learned about the new system, re-read your Bylaws. The older and more detailed your Bylaws, the more things you're likely to need to change. There currently is no hard deadline for when these Bylaw changes are required, but mid-year 2025 has been suggested.
8. **Prepare for Auto-Renewal:** One of the features of the new system is auto-renewal. That's good news - it means members who sign up and want to be members long-term should never forget again.
9. **Decide about Student Memberships:** Zero-dues student memberships have been eliminated in the new system. Your League must decide if you wish to subsidize students' Individual Memberships after January 2025 and, if so, how you will handle the payments for those subsidies. If you do, don't forget to include that expense in your budget. Your minimum cost could be \$20 per 'subsidized' member per year.
  - a. There will be a mechanism for Leagues to subsidize members to pay below the \$20 floor if they choose, including students, but the specific mechanism has not yet been publicized.
10. **Prepare your Website Changes:** Does your League have a website?

- a. **If you do not currently have a website:** A free website will be provided through ChapterSpot. A QR code linking to the National membership website will be provided for local Leagues for use on handouts, in printed newsletters, at events, or on signage. Information on how to set this up will be available during training.
- b. **If you have a MyLO website:** You'll be getting information from MyLO about how to set up the link to ChapterSpot.
- c. **If you're a ClubExpress user:** ClubExpress is working with ChapterSpot on how the download of updated member data from Salesforce/ChapterSpot will work.
  - i. For **Membership:** Information on how the People **Control Panel** items related to Dues, Renewal, and Expiration settings and renewal reminders will need to be changed has not yet been distributed.
  - ii. For **JOIN:**
    1. If all you have now is a JOIN button that takes users directly to the "New Member Sign-up" Built-in CE Module, you'll just change the target of that button to the ChapterSpot external page.
    2. If you have created a customized Join page on your site, you will need to modify or replace this page to direct your members to the LWVUS member dues site.
  - iii. For **RENEW:** Monitor your emails from both ClubExpress and the [LWVCE Roundtable](#). ClubExpress is still working with ChapterSpot on how that will work, since it's now an automatic reminder triggered inside the CE system, but will change over to a reminder email system generated by ChapterSpot.
- d. **If you have another website type:**
  - i. Every website will be required to have Join and Renew links (probably buttons, but that's up to your website design) that take the visitor to the LWVUS Chapterspot membership page.
  - ii. Check now for every place on your website where you link to a JOIN or RENEW online or to a downloadable paper form. These will need to be changed for the cutover at the end of January 2025. (see also point 3 above)
  - iii. More detailed information will be provided in the training sessions in November/December 2024, so be sure to have someone who maintains your website ready to attend this training.
- e. **Prepare for Maintaining Local Member Information Files:** Who maintains which data about your members is going to change in January/February, 2025.

Currently each local League is responsible for entering all the information about their members. A Roster Manager at each local League updates the National database.

With the new National platform, members will be able to sign in to the LWV National database at any time and modify their data. Roster Managers will still have access to the roster to update member information as needed.

- i. Every League member nationwide will receive an email in January/February 2025 requesting them to sign in to the new system and update their file. Your local files will not be automatically updated by this process, with the possible exception of ClubExpress users, who should have a 'reverse-member-update' service provided by ClubExpress.
- ii. There is no guarantee that every bit of information that your local League currently tracks about your members will be tracked in the National member database. For example, ChapterSpot will provide updated basic member data to ClubExpress for download, but it will not provide Transaction information about dues or donations paid, so this cannot be downloaded automatically by ClubExpress.
- iii. Before February 2025 would be a good time to do an inventory of all your current member data fields and files. Decide which data you need, what you won't need anymore. Then, **after the November/December training, you can decide how you will synchronize those data fields with the fields that LWVUS will be maintaining after January/February 2025**  
At the training in November/December 2024, Leagues will find out what data will be in the National Membership file and then be able to check which data that you now store locally will or will not be in the National files.
- iv. **Start preparing for your member data needs** by checking:
  1. Do you an **email program** (like MailChimp or Constant Contact) or any other where you have separate email distribution list for your members? Who keeps that updated? Since members will now be able to update their information online through the ChapterSpot portal, you'll need to be able to get that update.
  2. Do you have a separate list of members in a **financial program** like Quicken or QuickBooks (or Excel)?
  3. Do you have a list of all the information about your members that your League tracks (e.g., in spreadsheets or card files)? What's kept separately by each Board Member or Committee chair? Where do they keep it?
    - a. How do you currently keep all that data synchronized?
    - b. How do you plan to keep it in sync with the National member database once any of your members can go online and change their information at any time?

## Background

LWVUS has announced that, starting in January 2025, all local LWV Leagues will be required to cease setting and collecting their own dues locally, and will, instead, participate in a national Membership Management system. The system is currently in development for LWVUS by [ChapterSpot](#). This is in keeping with the [Structure Transformation Plan](#) of 2022.

In the new system, dues are set as follows:

- **'Pay what you can'**: Any individual may join the League for one year by paying *any amount equal to or greater than \$20*.
- The suggested amount will be **\$75**.
- Member Types:
  - There is **no longer** a Household/Associate membership type - only Individual Member.
  - There is **no longer** a Student Member type. Like any other member, they must pay at least \$20, unless the local League subsidizes them out of their local League budget
  - Persons who have been members for 50 years are Life Members and will continue to have their member dues waived.
- Auto-Renew: Members will be encouraged to register their financial information to sign up for automatic renewal.

The PMP (Per-Member Payment) system will be partially abolished (its removal from the LWVUS Bylaws was approved at the 2022 National Convention), **except for ILO – Intermediate Leagues**, which continue to set their own method of funding outside of this system, which may include PMP or flat fees.

Instead, dues income for National, State, and Local Leagues will be shared as a percentage, calculated as follows: **After financial fees** (such as credit card processing), **LWVUS-33%, state LWV-47%, local LWV-20%**. A chart of sample dues is available on the [ChapterSpot Resources page](#).

[ChapterSpot](#) is the company selected to create the new membership system. Their selection was announced in October 2023. Beta testing is planned for the fall of 2024. Training for local League leadership is planned to occur after the November 2024 election.

It has been announced that **every** local League is expected to launch on this new system on February 1, 2025. The February 1, 2025 cutover date has been chosen so that the traditional annual January 31 PMP cutoff can be used for 2024 PMP payments to LWVUS and State Leagues. Rolling renewals have been chosen from then forward to do away with the issue of prorated dues.

This paper was written by Marilyn Sherry, LWVCS. Edited by LWVUS. Last revised 9/10/24.