Computer-assisted Administrative Systems for Probus Clubs

Background
　　Most Probus clubs are very active groups. They collect and deposit membership fees, they organize events, they run a website, they send out emails, they create newsletters. Volunteers are required to do these tasks, yet seniors these days are very busy and may take a lot of persuading to help out. They are certainly not much interested in doing repetitive grunt work. For example, not too many people want to be the membership chair if they have to collect hundreds of paper renewal forms, or be a treasurer if they have to deposit hundreds of cheques. That's where systems come in to play. By spending money on systems, it eases the work load on the volunteers and makes it easier for them to help out.
　　Using computer systems may not apply to all clubs, of course, since some may operate very simply and have little need of IT tools. On the other hand, if yours is a club with a lot of activity, and your volunteers are tied up doing grunt work, read on. New clubs should look at systems needs early in their formation, and work out a comprehensive plan for how they want the club to be run. It is costly in terms of wasted work hours if a club starts building a piecemeal system then have to change later.

Where can systems help?

A lot of places!

Membership Database
- Managing members profiles
- Creating membership renewal notices
- Collecting new membership fees and renewal fees

Groups and event management
- Keeping track of group membership
- Posting descriptions of individual events
- Emailing invitations and reminders for events
- Collecting money for pre-paid events
- Creating an events calendar

Accounting
- Creating budgets
- Tracking income and expense
- Managing bank accounts or other accounts and assets
- Creating financial reports

Mass emailing
- For membership renewals and reminders.
- For announcements
- For newsletters
- For event notices and reminders as mentioned above

Website
- For keeping members informed of club activities
- For informing potential new members

So What Systems Are Available?

First of all, you need to decide if you can manage with inexpensive single-purpose tools, or spend some money and buy purpose-built membership software. This decision will be based on how complicated you feel your club's needs are or will be, and also on what resources and talents you have within the club to use and manage the tools you choose.

A. Individual solutions.

These are not integrated, i.e., they don't talk to each other, but can provide plenty of power to reduce volunteer workload. Let's look at some common ones.

- **Membership database.** Many clubs use database software like Excel or Access to keep track of members' data. As well, there are many other database packages out there that can be found by an internet search, some of which are free or low cost. All the data must be entered manually by the membership volunteer, but a wide range of fields can be recorded. The software is robust and powerful. These can be sorted any which way and reports can be printed. For example, you can create and print lists of people who have signed up for a specific group, or a report on who has paid. You can create mailing labels for renewal notices, say, or invitations to an event. You can download email addresses to a mass email tool. The drawback is that the membership volunteer has to do all the work and enter all the data by hand. Members cannot update anything on their profile. New members cannot apply online. Payments are not automatically recorded. Downloads can only be done by those with access to the model. Not only that, but often subgroups maintain their own database which can quickly get out of synch with the master,
- **Group and Events Management.** These are tricky and require a combination of web site posting, mass emails for informing the members of the options, database software to track who has signed up for which groups and certain activities. There is event management software out there, but if you want to go that route, better to get the purpose-built membership management software described below.

- **Accounting.** This comes down to the treasurer's preferences.
  - A few clubs still use a paper system with ledgers. Egad! This has obvious drawbacks, particularly the intensive manual effort, difficulty of transfer to the next user, and high potential for inaccuracies.
  - The next level up is to use a database tool such as Excel or Access. It can become a fairly large model, and may have several sheets, but it does all of the math accurately and the tools can be set up to produce the required financial reports. Many people have the software loaded on their computer already, so there is no cost involved. Entries must be made manually.
  - Bumping it up a notch gets you into purpose-built accounting software like Simply Accounting or the popular Quicken. (Avoid Quickbooks. It is way to powerful for Probus needs and it is like hitting a thumbtack with a sledge hammer.) There are many of these available and an internet search can lead you to comparison website or rating websites. These have been around for a long time and have powerful features for tracking any number of accounts with any number of categories and creating reports. They have links to your bank so that data can be transferred from your bank to the system. Other information is entered manually. Cost for Quicken software is $40Canadian/year.

- **Mass Emailing:** Here again, there are many packages out there, usually free, that can be found by searching the internet. My experience has been with MailChimp so will confine my remarks to it. It is slick to use. You can download profile information (e.g. first name, last name, email address) from your database tool and include these in your email. For example, each email can be tailored to individuals and it will say Dear John Smith. You can create nice looking emails with embedded photos or headings, and create links to files or webpages. You can create templates such as for your newsletter with multiple columns. Reports allow you to see if any emails have bounced, how many have been opened, if links have been clicked. Each member must have a unique email address. MailChimp and others like it are more suitable for email blasts than personal email systems like Gmail.

- **Websites.** There are so many web making tools that the selection is based more on the experience of your webmaster than anything else. It is too big a topic with so many options that we can't go into it in detail here. Many are free. If you buy your domain name from someone like GoDaddy for example, they have web building software for free. Canadian Domain Name Services can provide a .ca domain name, and also provide unique e-mail addresses for club functions like President, information, etc. at a small additional charge. There are robust tools like WordPress which has been around for years, again free, that are extremely powerful. Clubs can custom build their own site if they have a member with those skills, or outsource to one of the many web builders. These last two options bring danger in that if your own designer decides to move to Borneo, you are in trouble. A custom builder means that you have to pay for any additional functionality, and if it was late in coming, the coding may not accommodate the change easily. You want to make sure that when assessing your options, you investigate to see if it can accommodate an event calendar, for example, or online membership application

B. Purpose-Built Membership Software.

I strongly support this solution for large or highly active Probus clubs as a way to minimize volunteer grunt work. It costs more money than the individual solutions, but it is worth it to keep your volunteers happy, and the costs are not that much. The tools are specifically designed for the activities of clubs such as ours, so you do not need to reinvent the wheel. There are many companies selling this kind of software and you can search for them on the internet to find which one suits your purposes.

In 2018, Toronto Probus and East York Probus got together, reviewed a number of them, then did a detailed assessment of three; *Wild Apricot*., *Club Member*, and *Club Runner* (used by Rotary Clubs). Wild Apricot was the winner because of its functionality and lower costs, (approx. $6/member/yr). It is a Canadian company based in Toronto. As of April 2020, 23 clubs are using this software which has resulted in a fees discount of 15%.

So what does Wild Apricot give us?
- Easy-to-manage, easy-to-use website. But you do need people with some level of IT skills to do it. They offer a wide variety of schemes.
- Public pages and pages for members only via login.
- Membership database. Members can maintain their own profile. Has standard fields and custom fields. It generates membership renewal invoice emails automatically, and sends reminders only to those who have not paid. Members pay online, so no cheque handling by the Treasurer

- Group management. Members can select which groups they want to be involved with, then get emails for events pertaining to that group. They do not get emails about groups they have not selected.
- Activities management. Events are posted on the activities calendar seen on the website. People register for an event online by following links in the email invitation. Members pay online for events that are not free. Email reminders are automatically sent to registrants. Email invitations only go to members who have signed up to the group involved, and reminders only go to those who have registered. Activity coordinators can limit attendance and create waitlists that run automatically.
- Payment using common tools which links right to the bank account. It's not free. You need to factor in the approx 3% fees in your budget. Wild Apricot uses Affinipay
- Mass emails for notices like Newsletter distribution or general announcements. These can be sent to everyone or to selected groups (e.g. new members, waitlist members, management team)

There are stipulations. Members must have a unique email address. Couples cannot share an address. This is far from a show stopper. Creating another email address is a simple matter. Members also must have basic computer skills and be able to go online, sign into the website, and sign up for activities click on menu items. These stipulations are easy to control when you have a new club, and should be rigorously enforced with no work-arounds.

Older clubs may have members who cannot use the website or do not have an email address, so volunteers must handle these people manually. This can add grunt work to them, but no more than is done today. Even then, insist that everyone who can use the internet has a unique email address. It is easy to create a new one and avoids time-consuming work arounds.

What most of these packages do not have is accounting software, so you need to use another option for that function.

Wild Apricot yearly charges and payment fees are approximately $6.00/yr per member when you go for a 2 year contract, and thus easily affordable. See https://www.wildapricot.com/pricing. Because we have more than 20 chapters signed up, we receive an extra 15% discount.
You need to address Affinipay or equivalent payment fees in your budget. This amounts to approx. 3% of each transaction. Most clubs raise their membership fees to pay for the software. Club fees are usually pretty low to start with, so adding 6 bucks per year does not get pushback from members.

Contact me for the Excel file so you can do the cost calculations based on your club fees. (grracine@bell.net)

The benefits of using Wild Apricot are:

- **Significant** reduction in volunteer hours, particularly for the treasurer and the membership chair. Event coordinators also see a big reduction in effort.
- Security of data and processes. Nothing stored in someone's basement. No dependence on one members' ability to code systems. No need to copy files from one computer to another when roles change. Strong controls for who has what administrative power.
- All functions accessible from anywhere you have WIFI access.
- Smart phone apps available for administrators and members.
- Excellent online support materials by WA.
- Active user group forum to get advice from other clubs.
- Existing users will share help pages for membership and user training.
- When you get back to holding in-person meetings, coffee time is for socializing, not racing to sign up or deliver cheques or sign up for events.

Note: These are my ideas and suggestions. They are currently not endorsed by Probus Canada which does not make any recommendations regarding systems solutions for individual clubs. Our user clubs are quite satisfied with the software and find it very effective. If you need more info, contact me. I can provide demos over Zoom if you are interested.

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