

Membership Management & Verification –5 W's



JANUARY 2021

Membership Verification



- Who: Our Members
- What: Active Membership
- Where: DA Nationbuilder Global Database
- When: By January 31, 2021
- Why: We need valid information about our members.
 - Our GOTV efforts center around our members.
 - The Membership Count Number is used to determine DPCA votes.

Membership Verification



- A member joins and is (re-)verified:
 - Expiry date (as valid member) is set for 4 years later.
 - the membership of Jane Doe who joined on November 2, 2020 will expire November 2, 2024.
- Expired members
 - Do not disappear and are **NOT to be deleted** from the database!
 - They continue as members in all senses of the term, except
 - they are no longer included in the official membership count
 - they get listed among the percentage of members "excluded from the membership count".
- Each country committee is asked to review their membership list each year and try, as far as possible, to confirm that each member is still present in their country.

Membership Verification - HOW



1. Automatic Verification— these actions will update the LVD

- Vote From Abroad - member submits FPCA via www.VoteFromAbroad.org & indicates that they are a member
- Website Event: member RSVPs to an event on the DA website
- Profile update – name, address, emails, email preference updated by the member
- Donation – Member donations will update the LVD

2. Manual Verification

- CC Membership Administrator manually verifies individual members as “Verified Still Living in Country”
- Global IT Admins do a batch update on a specific list (for us to do this it must be a list of over 100 people, and all the member information must be complete and correct and in the excel sheet format that IT gives you)

Membership Verification



Wiki references for more technical specifics:

- [Membership Verification Tips](#)
- [Membership: Approving, Welcoming and Moving your members](#)
- [Membership: Dealing with Duplicates](#)

WHO – Our members



- When a member joins, a membership expiry date is set for 4 years later. For example: Jennifer joined on November 7, 2016 and her membership expired November 7, 2020.
- Each country committee is asked to review your membership list each year and try to confirm that each of your members is still present in your country.
- Members who have RSVP'd on the Website to an event are automatically updated.

WHAT – Active Membership



- Verification implies that you can confirm the member is still living in the country.
- The Last Verified Date is the date that they or you last confirmed they are still a DA member living in your country.
 - It does not mean that you are confirming that all their contact information is correct although that is desirable.
- A Valid DA Membership means that they have been in contact or you have verified them within the last 4 years.
- Expired members should NOT be deleted from the database! They continue as members in all senses of the term, EXCEPT that they are no longer included in the official membership count taken each January 31.
 - they get listed among the percentage of members "excluded from the membership count".

WHERE – DA Nationbuilder Database



- Valid members are only considered members if they have officially joined using our website.
- Valid members have given us their personal data. This data can ONLY be saved in Nationbuilder.
- Saving Personal Data outside of the database is expressly against our Privacy and Data policies. See our GDPR policies.*
- Facebook, Twitter, and Instagram users are not members.

WHEN – Every year before February 1

- Our annual Membership Verification drive or Membership Count begins every year in October or November.
- The Count is officially over on February 1.
- The IT Team generates country membership lists around the 1 or 2 of each month from November through January.
- These lists are available to each country upon request.
 - Countries with chapters are responsible for distribution to their chapters.



WHY – Member Verification

- Members are DA's most important asset.
- We need valid information about our members.
- Our GOTV efforts center around our members.
- Accurate member information is critical to outreach to our members
- The Membership Count Number is used to determine DPCA votes.



2021 Specific verification

- Intensive Phone Banking = 1000's of phone #'s have been removed
 - Don't be surprised if you see fewer phone numbers now
- Many people have moved within their country of residence, so:
 - Make sure everyone is in the right chapter.



2021 Specific verification - Filters




Saved Filters: We have set up a series of Saved Filters to help you find the people whose membership has expired, thus the first priority for emailing and phone banking:

- **2021 Expired** - all the people with memberships expiring before 2020-02-01
- **2021 Expired BadEmailCallable** – email is bad, but they can be called
- **2021 Expired OptOutCallable** – person has opted out of email, but can be called
- **2021 Expired NotEmailableNotCallable** - not emailable (bad address or opt-out) with no phone number (or marked as do not call)
- **NoAddressNophone** - people who will be excluded from the membership count because they have no local contact information

Sending **emails** and updating Members

Communication > Search people...

DA France-Avignon ONLY FRANCE-AVIGNON CAN SEND

 **Email:** Info-FR-Avignon@democratsabroad.org · 72 email blasts · Avignon Thanksgiving Zoom Apero 1 month ago
Text: none · [Add text messaging](#)
Twitter: none · [Connect Twitter account](#)
Facebook: none · [Connect Facebook page](#)

Dashboard Email **Texting** Settings New email blast

Activity for All time

Email Blasts

See the Wiki: [Email Blasts: With Auto-tags and linked to Google Auto-Fill Forms](#)

Individual Emails
from the control panel

Note **Email** Log contact RSVP Pledge Donation

From Broadcaster*

"DA Italy-Venice" <Info-IT-Venice@democratsabroad.org> ▼

Add Cc Add Bcc

Subject*

Greetings from DA - Are you still in Venice?

Attach a file

Message

Dear Mary,

We do an annual membership verification, and this year we are reaching out to you to check in. We haven't heard from you since 2016. Are you still living in Venice? Do you still want to be a member of DA Italy?

Please let us know. Thanks!

Sincerely,
The DA Italy Team

Contact type

× Question ▼



Sending emails and **updating** Members*

Dashboard Edit Location Finances Profile Network Relationships Social capital Paths Merge duplicates

party member Verified Member of DA opted in volunteering

Note Email **Log contact** RSVP Pledge Donation

Note

Method

Email

Method

Email

Delivery

Door knock

Email

Email blast

Face to face

Facebook

Delivery

Door knock

Email

Email blast

Face to face

Facebook

Meeting

Phone call

Robocall

Snail mail

Text

Text blast

Tweet

Video call

Webinar

LinkedIn

other

Method

Email

Contact type

× Verified Still Living in Country

1sc

Contact status

Answered

Bad info

Inaccessible

Left message

Meaningful interaction

Not interested

No answer

Refused

Send information

Other

* This update is not always immediately visible and can take up to 3-4 days to complete. All updates will be completed on January 31.

Membership Admins: Watch out!



- Make sure phone numbers entered are in callable format
- Try to make sure all members are emailable
- Addresses - Encourage members to give full voting & overseas addresses
- Reach out to volunteers
- Remove uncontactable, deceased and non-US citizen members
- Log Contacts CORRECTLY. Forgot how?
See pages 11 & 12 in the [Membership Admin PDF](#)
- Don't forget to list your events online so you can reduce the amount of verification work you do!

GDPR and Membership Verification



- **NO** information can be **changed** unless it comes directly from the member themselves.
- If the member is deceased and the source of your information is a family member or an obituary, you can delete them.
- You **MUST** delete the excel list of members 30 days after you received it.
- You may not copy any information about members into a personal list of *any* kind.
- You may not send a personal email to your members asking them to verify themselves.
 - **Only Exception**: if they are a close friend of yours, not just someone that you know through DA.
- A Useful list of do's and don'ts and the [explanation of GDPR is in the Wiki.](#)

GDPR and Membership Verification

Do:

- Call your local members at home or on their cell, depending on the database information
- Send them a local email blast
- Send them an email from their record



Don't:

- Text your members using WhatsApp
- Message your members on Facebook
- Email them from your personal email to ask them to verify themselves
- Call them or email them using their work information
- Look them up on Google to find more contact information
- Update their records because of Google, Facebook, Twitter, LinkedIn information



Some Verification Do's and Don'ts

Example Scenarios	OK to Verify	OK to Delete	Comments
Snail Mail sent and returned	No	Depends	Delete if their email is bad or unsubscribed AND there are no working phone numbers
An email does not bounce	No	No	A working email does not imply that the person still lives in the country.
Receive email with country contact info in the signature	Yes	No	
Receive email (or other indication) that they have returned to USA	Yes	Depends	<ul style="list-style-type: none"> • Check to see if they would like to be placed on the US Alumni list and receive global emails. • If YES, then <ul style="list-style-type: none"> - add "Verified US Alumni" tag - update primary address to their US Address • follow the membership manual instructions on how to move people to the USA. • If NO, then delete.
If answering machine answers and does not include the person's name	No	No	
You read or hear about their death	No	Yes	Assuming it is from a reliable source

Some Verification Do's and Don'ts

Example Scenarios	OK to Verify	OK to Delete	Comments
The person put a "I plan to Return" date when they joined that has passed	No	No	Many people stay beyond their planned return date so should still contact them
You have no working email, no valid address, no working phone number, and cannot find anything current about them on Google	No	Yes	If there is no way that DA can contact a person, they should be deleted
They asked to stop receiving emails	Depends	Depends	<ul style="list-style-type: none"> · If their email says they moved back to US, delete them. · If they opt-out, ask if they are willing to receive phone calls or letters. · If they want no communication from us, delete them.
They are a member of your FB/Twitter/ Social Media Group	Depends	Depends	<ul style="list-style-type: none"> · If they are active in your group and you know they are in your country because of this activity, you can verify them. · You cannot use FB or any social media information to MOVE someone. · If someone in the group tells you that the member has moved or passed away, you cannot do anything with the information – this is third party information. · If someone is deceased, please verify this information through a trustworthy source

Sample January Tasklist for Verification

Step	Date	Assigned to	Status	Notes
Country Report Available	1-Jan-21	Global IT		
Country Report Requested		Country Chair		
Create Chapter spreadsheets				
Send spreadsheets to Chapters				
Run Chapter assignment checks (before chapters get calling lists)				
DAF Email blast to emailable members who are expiring - 1	7-Jan-21			
Chapters making calls				
Return the sheet to with any updates you need us to do				
Chapters send an email to members you know have moved back to the US, asking if they'd like you to update their record.				
Return sheets with any updates you can't make updates yourself				
Chapter Email blast to emailable members who are expiring - 2	15-Jan-21			
Delete the old sheet from your devices.				
Receive a new sheet.				
Make more calls/texts				
DAF Email blast to emailable expiring members -3				
Delete the old sheet from your devices.				
Make all Updates	31-Jan-21			
Verify all New Members	31-Jan-21			(new unapproved members are excluded from the count)