



Membership 2.0.1:

Tips on Verifying Memberships – for the annual count and day-by-day throughout the year

MAY 2022



Instead of waiting until the end of the year to verify all your members, you can handle a lot of database clutter if you get into the habit of verifying your members as you go.

The next few pages contain a few tips on light housekeeping you can do regularly.





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Filters to help you find expired memberships

But before we talk about daily housekeeping, here are some saved filters to help you find the members to be verified as a first priority for the Jan. 31, 2022 count:

2022 Expired - all the people with memberships expiring before 2021-02-01

2022 Expired Emailable – people who can be emailed

2022 Expired NotEmailableNotCallable – not emailable, for any reason, but can be called

2022 Expired BadEmailCallable – email is bad, but they can be called

2022 Expired Opt-OutCallable – person has opted out of email, but can be called

2022 Expired NotEmailableNotCallable - not emailable (any reason) 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

REMEMBER: DO NOT create these filters for your country. When using them they will work perfectly to only display people in your own country or chapter.



Social Media - Helpful... with important limits

It can be helpful to look people up in social media to confirm whether they are still living in your country (so you can update the Last Verified Date (LVD)).

However, due to GDPR, there are ***strict rules about this*** for all our members - even those not living in Europe.

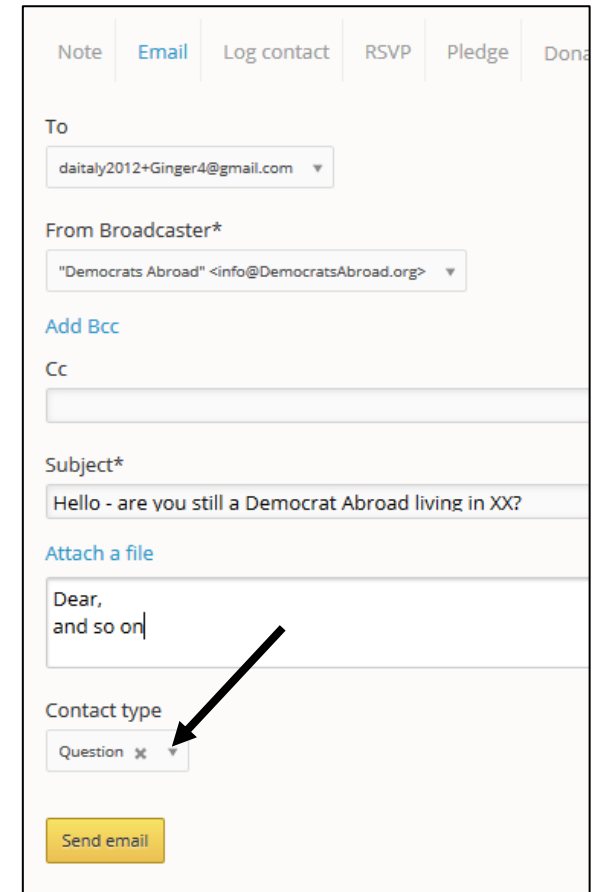
- You ***cannot*** use social media information to move a member to another country or delete their membership if they are back in the USA.
- You ***can***, however, write or email the member asking them to confirm if they are still in your country, but you ***cannot*** write saying “I see you are now living in.....”)
- ***Do not*** message them via facebook, but use their member record to send an email (if they are emailable) or call (if they are not marked ‘do not call’)

Emailing Individual Members - from their record

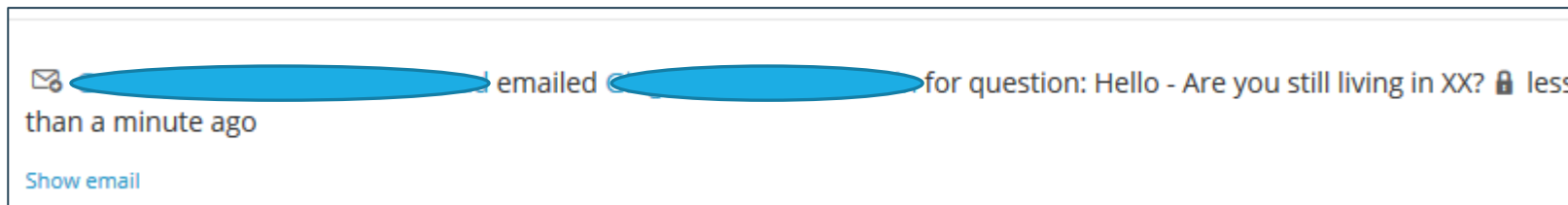
The best way to keep track of your contacts with individual members is to email directly from the person's member record. Click Email and prepare your message. **Note:** For reasons of privacy and DA credibility you must never send an unsolicited email to members from your own personal email account!

VERY IMPORTANT though: If you are asking the member a QUESTION to verify her/his membership make sure you use the Contact type: **Question**

Your email is visible on the member's dashboard, as shown below.



The screenshot shows the email composition interface for a member record. At the top, there are tabs for 'Note', 'Email', 'Log contact', 'RSVP', 'Pledge', and 'Donation'. The 'Email' tab is selected. Below the tabs, the 'To' field contains the email address 'daitaly2012+Ginger4@gmail.com'. The 'From Broadcaster*' field is set to '"Democrats Abroad" <info@DemocratsAbroad.org>'. There is an 'Add Bcc' link. The 'Cc' field is empty. The 'Subject*' field contains the text 'Hello - are you still a Democrat Abroad living in XX?'. Below the subject field is an 'Attach a file' link. The main body of the email contains the text 'Dear, and so on'. At the bottom, there is a 'Contact type' dropdown menu with 'Question' selected, indicated by a black arrow. Below the dropdown is a yellow 'Send email' button.



Email Blast Sent Results

- Look at the results of your email – unsubscribes, bad email and bounced

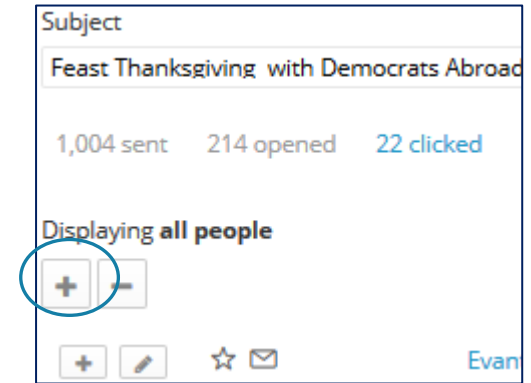
Dashboard	Settings	Files (1)	Recipients	Theme	Body	Spam Score	Clone	Preview
1,004 sent	21.31% 214 opened	2.19% 22 clicked	\$0.00 0 donated	1.20% 12 bounced	0.00% 0 bad	0.00% 0 spam reported	0.00% 0 unsubscribed	

- If you see that someone has unsubscribed, contact them to see whether they want to simply remain off the mailing list or whether they have moved to another country or wish to be completely removed. Depending on the reply you can:
 - If they are still a member but off mailing list: log a contact (type: Other)
 - If they moved to another country: see the [advanced manuals page](#) for instructions on [Moving a Member to a New Country](#)
 - Or if they wish, delete their member record: page 13 below
- Contact people with bad / bounced addresses to see if they have a new address.

Email Blast Click-throughs

Look at the list of people who clicked, especially if the email was fairly location specific, like an event announcement:

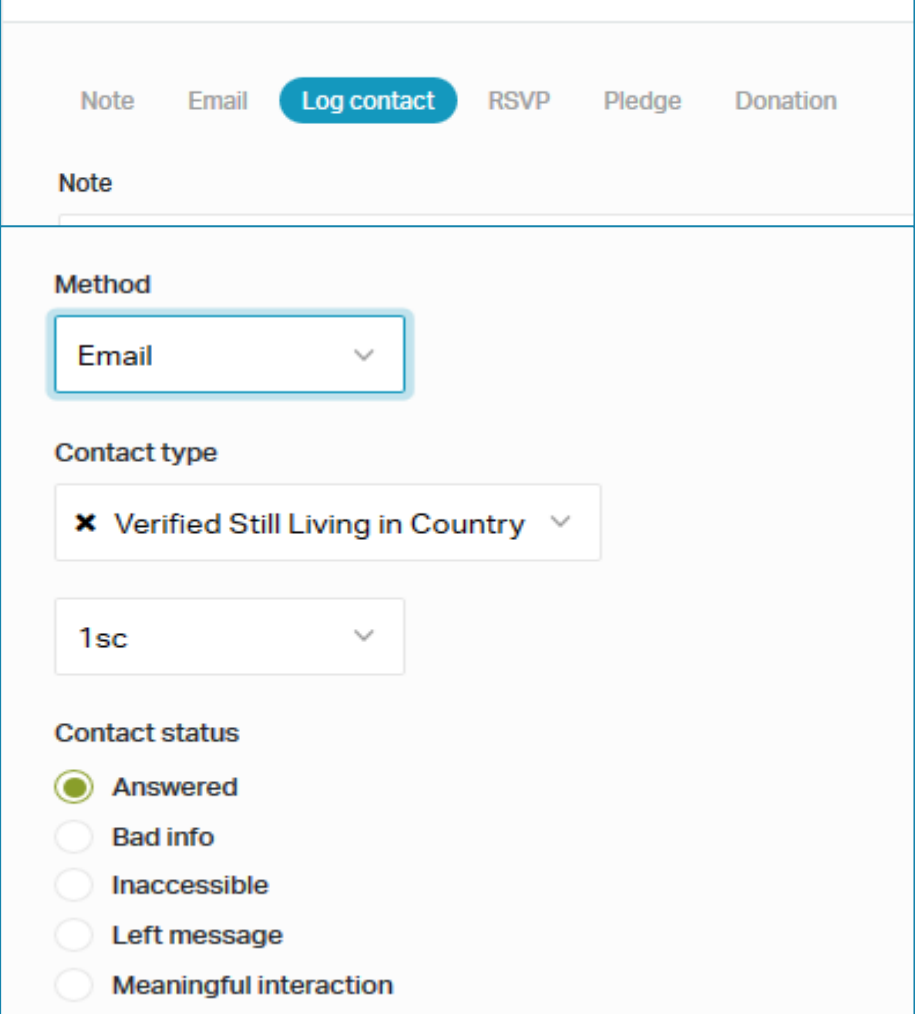
Click the + button to add all the 'clickers' to a list. Review the list and then you can update their Last Verify Date using a bulk update. (see pages 8-9 for instructions)



Logging a contact when a member replies to email

Open the member record of people who reply to email and **Log contact**

- **Method** = Email
- **Contact type:** Verified still living in country
- **Contact Status** = Answered or Meaningful interaction
- Vacation Replies can also be useful, *as long as it's fully clear from the message that they still live in your country*. In this case, it's better to use contact **Method: Other**



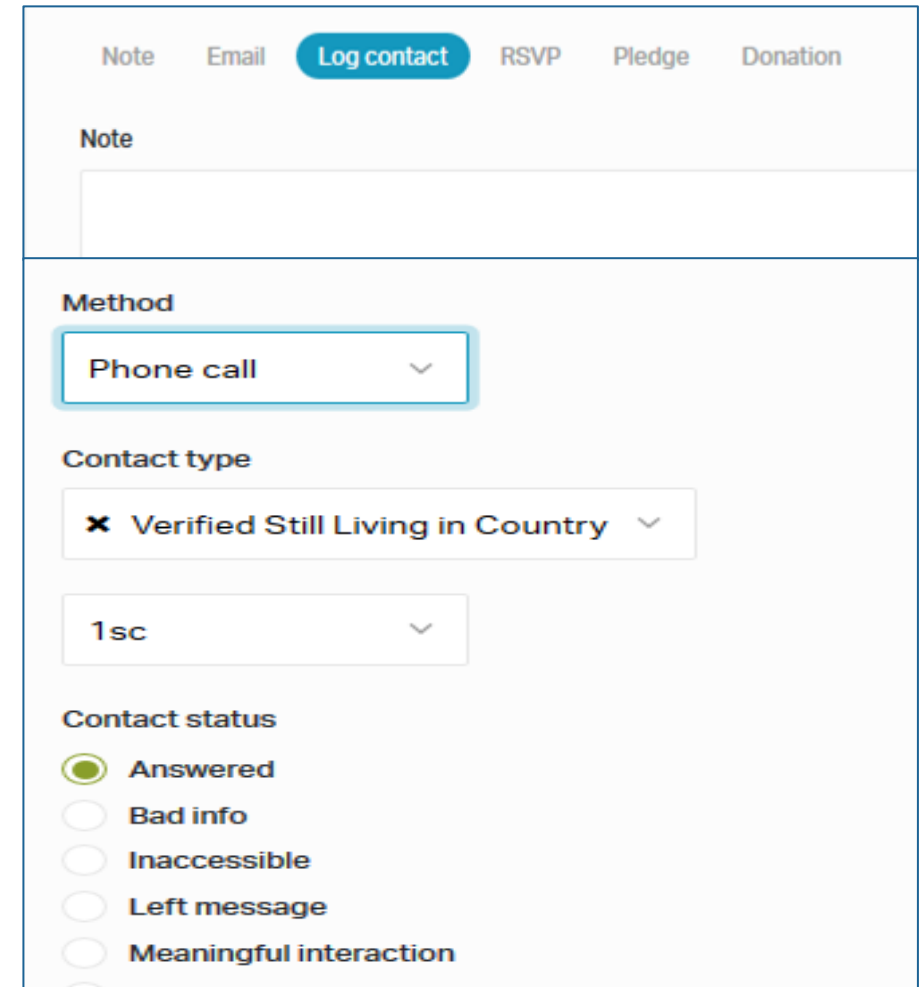
The screenshot shows a web interface for logging a contact. At the top, there are navigation tabs: Note, Email, Log contact (highlighted in blue), RSVP, Pledge, and Donation. Below the tabs is a 'Note' field. The main form area contains the following fields:

- Method:** A dropdown menu with 'Email' selected.
- Contact type:** A dropdown menu with 'Verified Still Living in Country' selected, preceded by a red 'x' icon.
- 1sc:** A dropdown menu with '1sc' selected.
- Contact status:** A list of radio buttons with the following options:
 - Answered
 - Bad info
 - Inaccessible
 - Left message
 - Meaningful interaction

Logging a phone contact:

Open the member record of people who have answered a call and **Log contact**

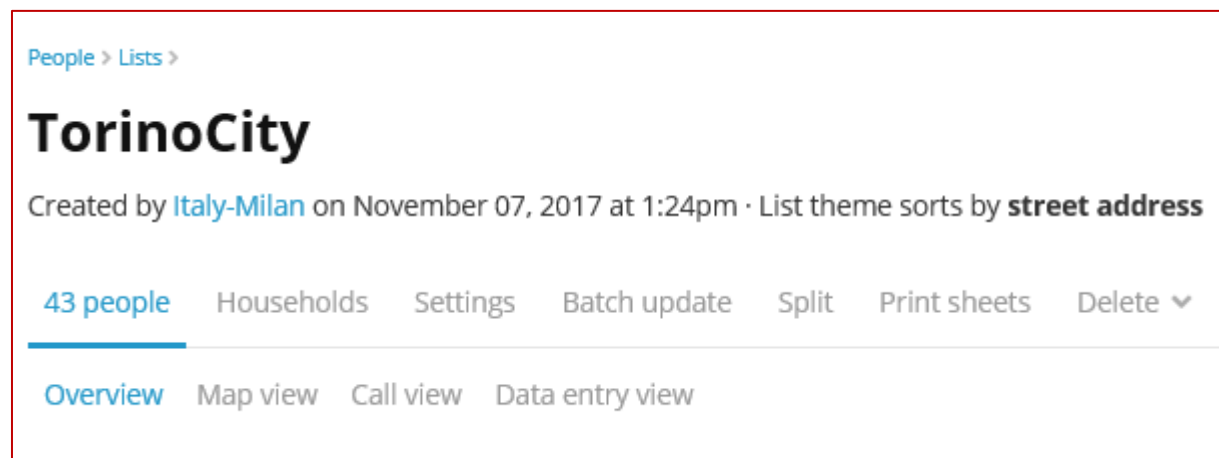
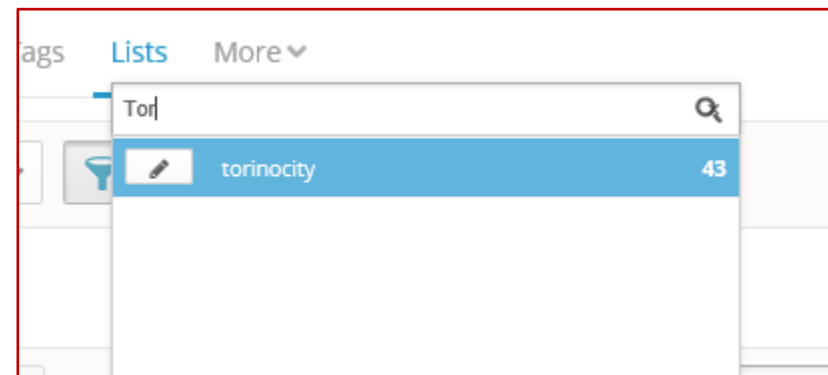
- **Method** = Phone call
- **Contact status** = Answered or Meaningful interaction



The screenshot shows a web interface for logging a contact. At the top, there are navigation tabs: Note, Email, Log contact (highlighted in blue), RSVP, Pledge, and Donation. Below the tabs is a text input field labeled "Note". Underneath is a section titled "Method" with a dropdown menu showing "Phone call". Below that is a section titled "Contact type" with a dropdown menu showing "Verified Still Living in Country" and a small 'x' icon. Below that is another dropdown menu showing "1sc". At the bottom is a section titled "Contact status" with radio buttons for "Answered" (selected), "Bad info", "Inaccessible", "Left message", and "Meaningful interaction".

Batch update of members using a list

- After adding members to a list you can update a batch of members in various ways
- Select the Lists tab at the top of the People screen and start typing the name of your list. Click to open the list page.
- Choose Batch update.
- Contact the [Helpdesk](#) if you have a long list of people whose Last Verified Date needs to be updated, giving us the name of the list they've been added to.



To delete or not to delete?

- If a person explicitly asks to be deleted from our membership list or has passed away, you must delete the member record within a week after notification. This is required by the European GDPR and is general good practice.
 - If it's not clear, write back to the member asking them exactly what they would like: if they wish to remain a member but not receive any emails from DA, if they have moved to another country or back to US (and whether they want to join the US Alumni group)
 - But once you've done your emailing and phone banking, what are you going to do with those vague cases – such as people who don't answer their email messages or phone numbers that are no longer in service? It is not often straightforward when exactly to delete a member, but here are some [guidelines based on experience by several long-standing membership managers](#).
- To have the member deleted** tag the record with “**delete member**”. Member records with this tag will be processed for deletion within 48 hours.



When to contact a global admin

Contact the Global Admin mailbox helpdesk@democratsabroad.org if you:

- Have forgotten your info-* login password – do not change it yourself – this is being done centrally
- Need a data extract (Excel spreadsheet)
- Need an import of data (must have had an export first since need the member ID in the file)
- Are a country officer who wishes to have someone's admin access removed, or need to have a login password changed.**
- Have questions not covered in anything on the [wiki training page](#) – you are expected to look there before asking.

** If you are a country chair wishing to **request membership, emailing and/or web access rights**, use the [Admin Request Form](#)