

BUILDING A BETTER FUTURE FOR CHILDREN

A membership organisation that promotes children's rights to ECD, strengthens NPO's and advocates for ECD

**MEMBERSHIP MANAGEMENT
SYSTEM**

SYSTEM SCOPE

PURPOSE OF THIS DOCUMENT

This document attempts to clarify the components and functions that the proposed Membership Management System will provide to the NECDA membership. It is based on the original proposal and fleshes out the elements and interactions that the various components will provide to the members and the system administrator.

PROJECT OBJECTIVES

Have an online system that can be used to

- provide role-base access to particular areas of the site
- provide value to Member Organisations through the provision of member-only information
- ensure access is limited to each Member Organisations details
- communicate with all or selected member organisations
- manage the activation and deactivation of access based on payment status
- create a platform for the further development of value-added functionality for Member Organisations

ROLE DEFINITIONS

Member	-	organisations that have registered as an ECD practitioner, either as an organisation with a XXXX number or as a training or similar organisation providing services to the ECD sector
System Administrators	-	NECDA staff member who administers content for NECDA or on behalf of members
Member Organisation Staff	-	This system will not engage with Member organisation's staff / team members

SYSTEM ACCESS PERMISSIONS

The system will enable access to the following sections / functions based on user type:

FUNCTION	ADMIN	MEMBER	PUBLIC
Existing member details:	X	X	
Org. details	X	X	
Org contacts details		X	
Send email to orgs.	X		
Event creation	X		
Edit member details	X	X	
update member payment status	X		
Members only area access	X	X	
Extract reports	X		
Member directory	X	X	X
New member application			X

DISCUSSION AROUND FORM CREATION / APPLICATION PROCESS

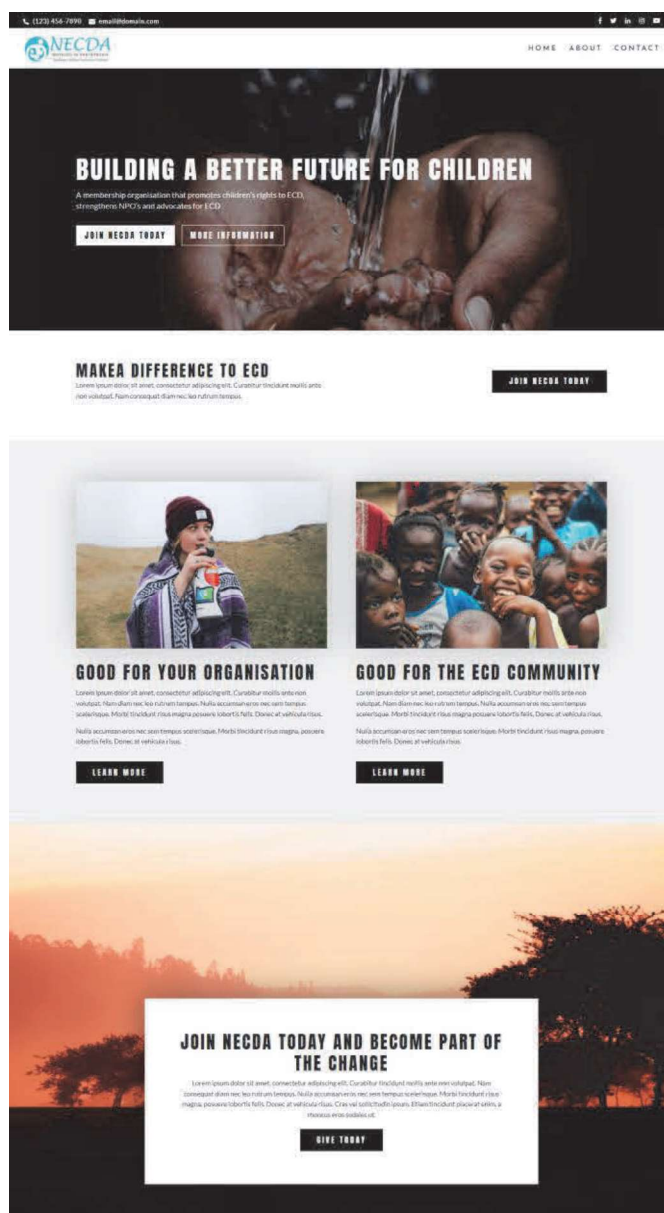
1. Online form completed by applicant (in line with current Word form)
2. Admin vets the new application manually
3. Admin manually sends 'approval' request to Board (approve/decline)
4. Admin marks (checkbox) profile as Accepted
 1. Admin has option to "Decline" a profile

NOTE-- Redfsoft to provide a quote to expedite item '3' above through the system

PROPOSED INTERFACE

The site will be independent of the NECDA / ECD Alliance site and will have its own interface. The Membership site will be inter-linked with the NECDA / ECD Alliance site/s and each will be accessible from the other.

The proposed interface design has been provided on the test link <http://necda.redefinesoftware.co.za>. This test site is intended to represent the style of the proposed membership and will be personalised / customised to suit the NECDA brand identity.



SYSTEM FEATURES

Organisation Profile Creation

Member User engagement	NECDA Administration engagement
Upload member organisation details Replicate current Word-based application form	No administration action required
Specify Member contacts Two in total <ul style="list-style-type: none"> • Director • Administrator 	No administration action required
Indicate areas of specialisation Select from choices provided by NECDA and hard-coded) -- (in line with current Word form	No administration action required
Accept Terms & Conditions Form will not be submitted if the T&C's are not accepted	No administration action required

Organisation Profile Approval

Member User engagement	NECDA Administration engagement
Completion and submission of Form	Admin vets the new application manually
	Admin sends 'approval' request to Board (approve/decline)
	Admin marks (checkbox) profile as Accepted
	Admin has option to "Decline" a profile

NECDA office communication

The system will be integrated with Mailchimp which will be used for the creation of, distribution of and reporting of email sent

Member User engagement	NECDA Administration engagement
Receive formatted emails as normal in their own email software	Create emails using templates of new
	Send emails to defined distribution groups
	Report on sent/received statistics, per email distribution
	Send to Areas of Specialisation and Regions (Provinces)
	Create own custom groups (eg Directors,

Events & Functions

These are either events that NECDA is hosting or events that Member Organisations are arranging and need promotion to the broader NECDA community

Member User engagement	NECDA Administration engagement
Send events details to NECDA admin via email	Create event profile , inclusive of: <ul style="list-style-type: none"> • Title • Date/s • Time/s • Venue • Payment requirements • Online or 'in person' • Online event link
Complete Attendance Form when registering for an event <ul style="list-style-type: none"> • Complete Form • Add Attendees names <ul style="list-style-type: none"> ○ applicant name ○ surname ○ designation ○ email contact ○ phone number 	Download list of Attendees NECDA will be able to export a list of Attendees

Registration confirmation Attendees will receive an automated confirmation email with a link to the online event	On 'submit' of registration a system generated autoresponder sends a Note with a link to the meeting (if on Zoom)
Access library of past events <ul style="list-style-type: none"> view supporting presentation material 	Administrator will manually create past event profiles and upload corresponding presentation material
Upcoming events Members will be able to view a calendar of upcoming events and register accordingly	Event will automatically be removed from the Upcoming Events list after the specified end-date
View list of upcoming events on NECDA website Members of the public will be able to view a list of upcoming events but will have to log in to the Member site to view the details and to register	No administration action required

Request for Assistance

Member organisations may submit an 'inquiry' form to seek assistance from NECDA\

Member User engagement	NECDA Administration engagement
Complete inquiry form <ul style="list-style-type: none"> Title Request description Name & Surname Contact number Email address 	Receive inquiries <ul style="list-style-type: none"> Named NECDA administrator will receive an email with the inquiry details Responses will be handled outside of the Membership system/site

Activate & Deactivate Organisation Profile

Member Organisations will be capable of indicating their paid status and uploading proof or registration payment. A named NECDA Administrator will be capable of finalising the membership approval process

Member User engagement	NECDA Administration engagement
Confirm Paid Status <ul style="list-style-type: none"> Select 'Paid' Checkbox Specify date of payment Upload Proof of Payment document <p>Note: All fields are required</p>	Activate Profile <ul style="list-style-type: none"> Named Administrator will open the Organisation Profile and select "Activate" button <p>On selection of the 'Activate' button the system will send an auto-generated Welcome email with the login details to the two named Member Users</p>
No functionality available for this element	View Tabular Schedule of Member Paid Status <p>View table of Organisations</p> <ul style="list-style-type: none"> Organisation Name Marked as Paid (Y/N) Director Approval (Y/N) Activate button <p>On selection of the 'Activate' button the system will send an auto-generated Welcome email with the login details to the two named Member Users</p>
View Payment History and Activation status <p>Member organisation will be capable of viewing a history of all their payment notifications and the Activation status of their profile</p>	View organisation Payment History <ul style="list-style-type: none"> Named Administrator will open the Organisation Profile and view history of payment status
No functionality available for this element	System auto-deactivation of Profile <ul style="list-style-type: none"> On anniversary of the Activation date the system will automatically mark the Profile as 'Inactive'.

	<ul style="list-style-type: none"> System will auto-generate an email to a named NECDA Administrator email address, notifying them of the Deactivation <p>Note: In the first iteration the Organisation will still be able to log in. In future phases this may restrict the Organisation from access the membership system until payment of Dues is made</p>
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Reporting

The system will provide the following Report

Member User engagement	NECDA Adminstration engagement
No functionality available for this element	<p>Access / Activity Report</p> <p>Named Administrator will be able to extract a Member Usage Report which will indicate</p> <ul style="list-style-type: none"> Organisation Name Login Dates
No functionality available for this element	<p>Membership by Province</p> <p>List of All Members by Province</p>
No functionality available for this element	<p>Membership by Specialisation</p> <p>Administrator can select multiple Areas of Specialisation and generated a report</p>
No functionality available for this element	<p>Payment Status</p> <p>Generate a list of Organisations by Paid Sttus</p>