

## **Admin Meeting 2/11/2019 Notes and Action Items (Agenda follows at end of this note)**

### **2/11 Old Business**

- 1. Marsha to schedule Data base/profile training (see email)**
- 2. Kaspers have completed Calendar and other training with rave reviews. Thank you!**
- 3. Treasurers have decided to meet as needed during 2019.**
- 4. Thank you Linda Briede for organizing and facilitating our March Admin meeting.**

**Our next meeting is Monday March 11 at 1PM. Please mark your calendars – as we will be meeting the 2<sup>nd</sup> Monday of each month during 2019**

### **2/11 New Business**

- 5. Membership counts. We reviewed how to get accurate membership counts. Individual counts should use the profile search (either front end or back end). Household counts can use the submissions list or export/summarize in excel.**
- 6. On March 3, MemberClicks reports that the registrant list bug has been corrected. Please verify and discuss at the March Admin meeting.**
- 7. Guest registrations create a prospect, with a First and Last Name. Deleting the prospect removes the individual from the registration list. Marsha has been deleting prospects, because they are also created when an individual tries to create a userid and does not complete the process. So that process is a problem. Marsha will no longer delete prospects that have a first and last name, rather she will periodically clear the email and user names from prospects. We decide how frequently to delete prospects, probably quarterly. Marsha will continue to delete prospects without a name.**
- 8. We confirmed our primary goal for 2019 is to move toward online only registration for large events. Progress on this goal should be a standing agenda item at our meetings.**
- 9. We agreed to post multi-date events on the first date only.**
- 10. Kurt reminded us to work our bounced emails. Bounced emails are listed on the message screen. And admin from each clubs should work those , probably after each broadcast email. HOA works them by 1) checking the village directory, 2) clearing the bounce if a spouse is a valid email or 3) phoning the individual or emailing the spouse. ALSO--- if the individual does not want an email on file, we set the email to [noemail@tellicolife.org](mailto:noemail@tellicolife.org). We don't use spaces in the email. This is so we can tell the difference between a mistake (blanks) and an intentional ([noemail@tellicolife.org](mailto:noemail@tellicolife.org))**
- 11. Marsha has repeated the Sponsors in the Club Section of the new home page.**
- 12. The ? Is not bringing up MemberClicks help for most admins. Use URL "help.memberclicks.com" to access the MemberClicks help guides.**
- 13. Admins to confirm with Treasurers who is issuing credit memos. Marsha's recommendation is that the Club Event admins issue credits, as they are more familiar with MemberClicks event signup and invoicing processes than the Treasurers.**

**14. Reminder to ALL: Sign up for our admin team circle, so that you receive emails from the team!**

**Admin Meeting 2/11/2019 Agenda**

REMINDER

We have scheduled our regular monthly meeting for the 2<sup>nd</sup> MONDAY of each month, Feb through November (no meeting in December). Location is the POA Large Conference room. 1PM – 3PM (if we need that long).

- The first to arrive should enter through the main POA entrance, be buzzed in and walk to the end of the hall. Open the outside door for others to enter. Last person to leave insures the outside door is closed and locked.
- Dates are: 2/11 3/11 4/8 5/13 6/10 7/8 8/12 9/9 10/14 11/11

Old Business

1. Schedule data base/profile management training: Marsha (set dates today)
2. Schedule start to finish golf training: Kaspers
3. Set up treasurers meeting: scheduled for tomorrow (Tues 2/12) Marsha
4. Documentation location / access check in.
5. Nomination for Admin to lead these meetings

New Business

1. New home page overview
2. Training needs/schedules for ?
  - a. Contact Center?
  - b. Chasing Checks?
  - c. Managing an event that fills up?
3. Membership counts – why not to use Registrant list count
4. Registrant List bug
  - a. What we know/don't know
  - b. Communication approach
5. Guest Registrations
  - a. Create prospects
  - b. How to manage those prospect
6. Goal status / actions
  - a. Moving toward on-line only registration for large events (update)
  - b. Other goals for 2019?
7. Status update / current issues

- a. New Villagers
  - b. TVCUC
8. HOA

Close

Post meeting

- Whats up wth KC's computer?
- Data base / profile training (time permitting)