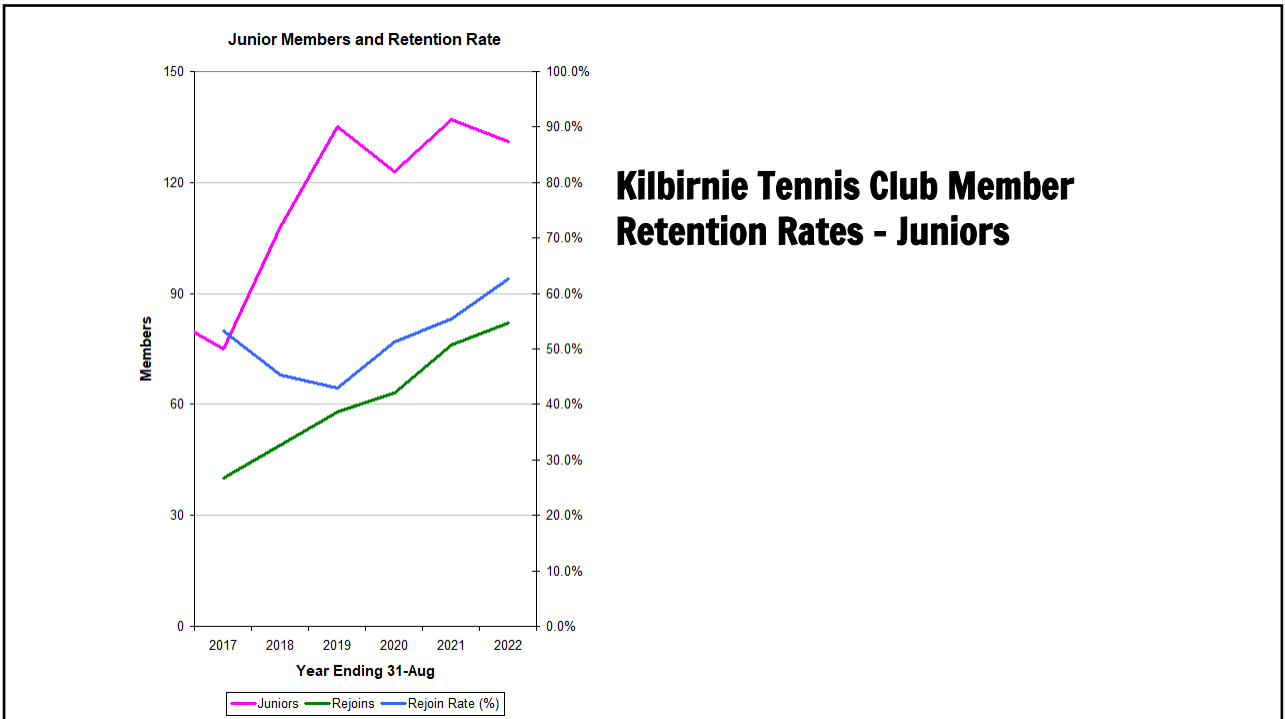
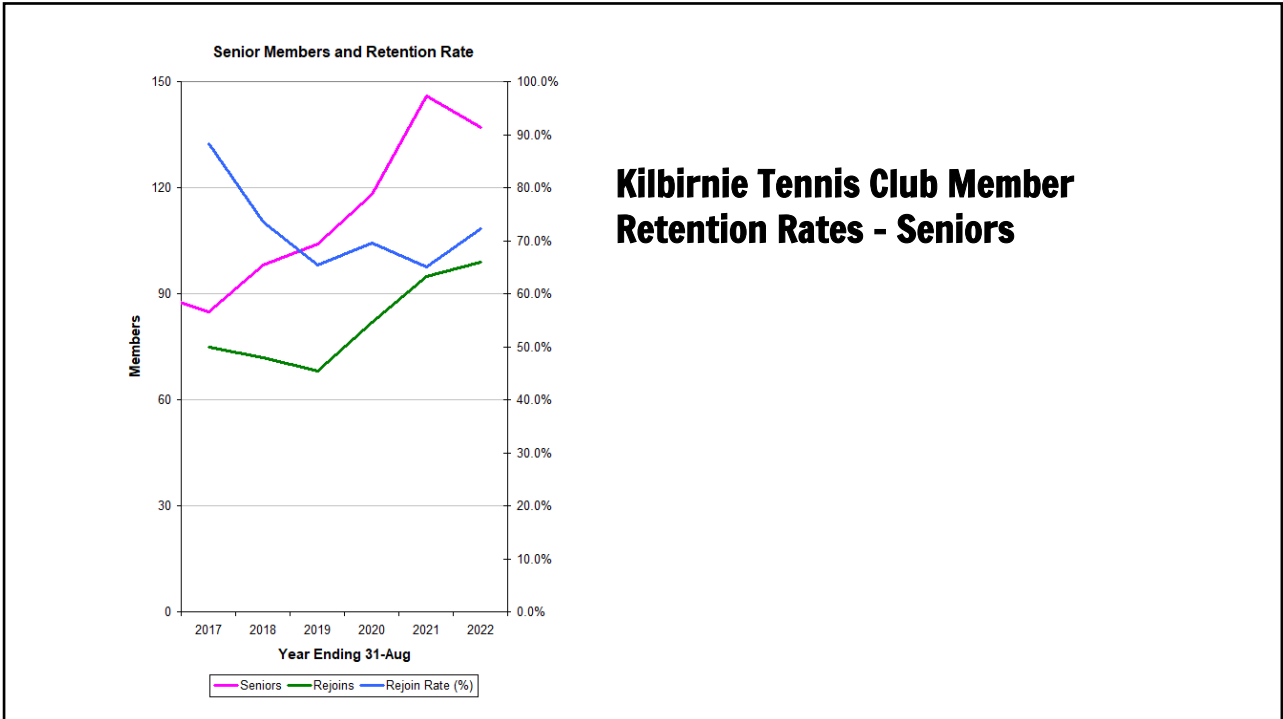




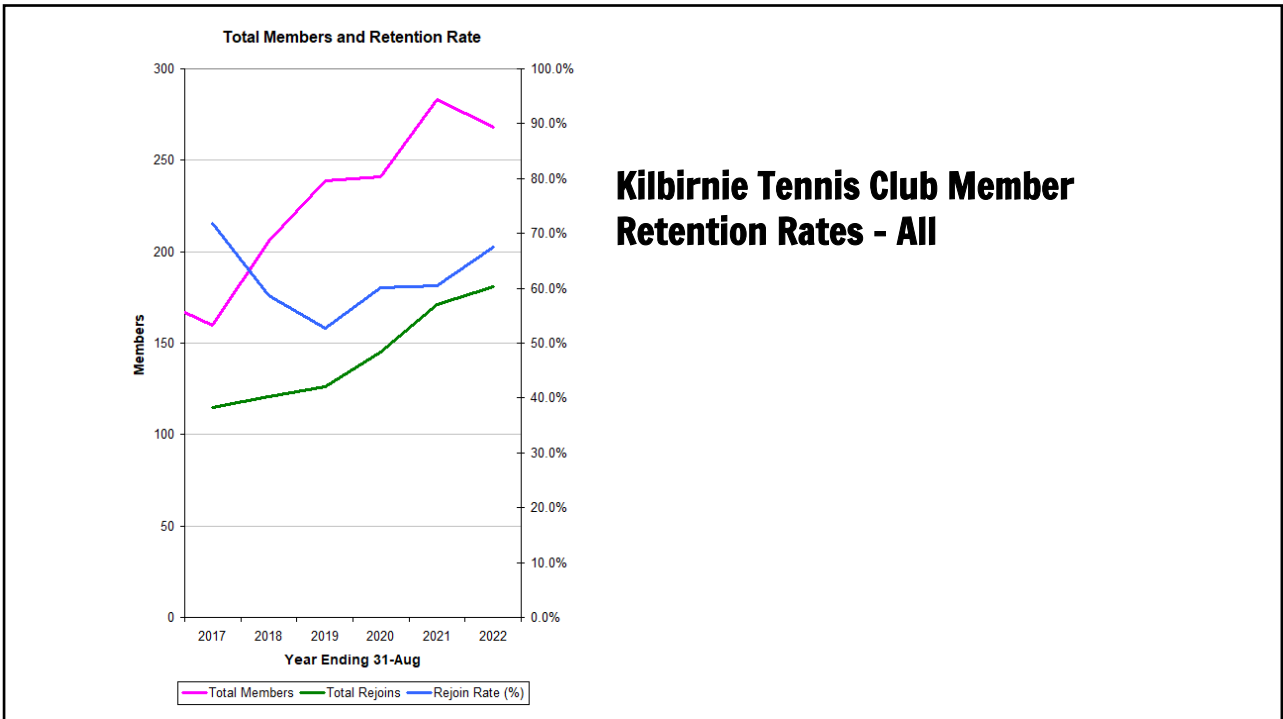
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How to derive retention data with ClubSpark

Follow these steps to allow derivation of member retention data in ClubSpark.

During any membership year...

Retained members = Active members at end of previous membership year

– Lapsed members in current membership year.

Active members at end of previous membership year should be recorded manually. It can also be derived from members in the previous membership year with payment status of paid. Any exceptions due to refunds and incomplete instalments will also need to be factored in – see below.

Event	Action (Membership status of person after action)			
	Pending	Active	Lapsed	Cancelled
New membership year	Copy Active member records from previous year's package to package for new year (records in new package assigned status of PENDING)			
New person registered	Member record created with status of PENDING			
Payment received (and membership paid in full)		Add payment and change status to ACTIVE		
Payment grace period for past year's members expires			If membership not paid in full, change status to LAPSED	
Past member notifies that they are leaving club		If membership paid in full, leave status as ACTIVE	If membership not paid in full, change status to LAPSED	
Life member confirms active status (or life member becomes active)		Payment of \$0 added and life member status changed to ACTIVE		
New Member Exceptions				
Payment grace period for new member expires	Leave status as PENDING			OR change status to CANCELLED
New member notifies that they are leaving club		If membership paid in full, leave status as ACTIVE		If membership not paid in full, change status to CANCELLED

Event	Action (Membership status of person after action)			
	Pending	Active	Lapsed	Cancelled
Part-payments				
Part-payment received (membership NOT paid in full)	If status is Pending, add payment and leave status as PENDING		If status is Lapsed, add payment and leave status as LAPSED	If status is Cancelled, add payment and leave status as CANCELLED
Refunds				
Full refund on membership fee approved			For past members, add refund and change status to LAPSED	For new members, add refund and change status to CANCELLED
Part refund on membership fee approved		If member retains full membership rights, add refund and leave status as ACTIVE	If past member and loses membership rights, add refund, change status to LAPSED, and flag this as an EXCEPTION*	If new member and loses membership rights, add refund, change status to CANCELLED, and flag this as an EXCEPTION*
Housekeeping				
Member record created in error				Delete record or, if payment also recorded in error, mark as CANCELLED
Two records created for the same person	Merge records – ensure correct record is winner. Status of winner retained.			
Instalments (where permitted)				
Instalment payment received	If instalments due NOT paid in full, add payment and change status to PENDING (if not already Pending)	If instalments due paid in full, add payment and change status to ACTIVE (if not already Active)		
Instalment payment grace period expires			If past member, change status to LAPSED and flag this as an EXCEPTION*	If new member, change status to CANCELLED and flag this as an EXCEPTION*

* EXCEPTIONS. Where a part refund has been issued or instalment payments are incomplete, and the member loses membership rights, the member's status should still be manually recorded as an EXCEPTION. If membership was longer than two months, payment to TCR of affiliation fees for the member are still required.

Note, for simplicity:

- avoid refunds on any membership longer than two months
- avoid instalments where members are entitled to stop payments part way through the year