



2018 Annual Board Meeting Executive Director's Report May 31, 2018

My goal as Executive Director is to assist officers and Board members with access to information and to provide tools that will help each person be more effective in their leadership role.

Program Development and Administration

- Membership outreach efforts by Daniel and those helping him have been excellent. However, it has been difficult to assess statistics this year because as we upgrade from MemberClicks Classic to the new platform our membership categories are changing. We have not upgraded many of the lapsed categories because we want to give people one more chance to rejoin CPFI.
- The new system will generate an invoice 30 days before it is time for a person to renew. Seven days before expiration a second renewal will go out if they have not renewed. One day after and 30 days after a message stating that their grace period is about to expire. 60 days later they will be informed that their membership is now inactive and that they have been moved to prospective status. At this point, they will no longer be able to access member portion of the website and register for events at member rates.
- In classic these things all had to be done manually and we had several different groups of membership that we would include in mailings to try to draw people back. We can still do this in the new system, but based on expiration date, not member type groups.
- The various lapsed groups will not exist. We will have primary groups (membership classes), pharmacists, student pharmacists and associates (librarians, administrators, pharmaceutical industry and friends – ministry partners). We do have a couple of sub-groups of pharmacists because of differential membership rates (pharmacist 1st year graduates, pharmacist 2nd year graduates, professionals and internationals).
- We do also have different membership levels for pharmacists, depending on the type of additional support they provide to CPFI: regular, contributing, supporting, and sustaining, as well as the Power Hour members and the 1% Group members.
- This is what an email will look like in the new system for someone 30 days before expiration:

Subject: New Invoice

Teresa,

It is time to renew your CPFI membership. Your membership expires: 03/31/2018. Your current membership level is: Supporting at \$250.00. You can renew at the same membership level and with the same payment type by simply clicking the **Pay Invoice** link below. If you would like to change your membership level (like joining the 1% Group, the Power Hour Group or by becoming a contributing, supporting or sustaining member) click [this link](#) and follow the instructions.

[Click here to pay this invoice](#)

- When a person receives this email, they can click on the pay this invoice link. It will take them to their internet browser already logged in and to detailed invoice page. If the individual wants to change their membership type, then there is a second link that will take them to the membership page where they can select one of several membership option, some new.
- If they choose the pay the invoice link they will see a webpage with the invoice details:

Subject: New Invoice

<p>Teresa Test 3495 Piedmont Rd. Atlanta, Georgia 30305 United States</p>	<p>Invoice # 26 Invoice Date 05/30/2018 Invoice Due Due Upon Receipt</p>
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Amount Due	\$250.00
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Transactions

Description	Amount
Membership Renewal	\$250.00

Total Amount	\$250.00
Amount Paid	-\$0.00
Amount Due	\$250.00

NOTES

If you have any questions about this invoice, please contact CPFI at 423-844-1043 or office@cpfi.org .

- Here the Pay Invoice will take them to a secure credit card or e-check payment page. We do not encourage it, but it is possible for a person to download the invoice, write out a check and mail the invoice and payment to the office.
- The office has different options where these two buttons show so that invoice can be credited or voided:

OPEN



Christian Pharmacists Fellowship International
P.O. Box 1154
Bristol, TN 37621-1154
423-844-1043

Teresa Teat
3495 Piedmont Rd.
Atlanta, Georgia 30305
United States

Invoice #	26
Invoice Date	05/30/2018
Invoice Due	Due Upon Receipt
Amount Due	\$250.00

Transactions

Description	Amount
Membership Renewal	\$250.00

Total Amount	\$250.00
Amount Paid	\$0.00
Amount Due	\$250.00

NOTES

If you have any questions about this invoice, please contact CPFI at 423-844-1043 or office@cpfi.org

[Pay Invoice](#) [Credit Invoice](#) [Void Invoice](#) [Download Invoice](#)

Enter Invoice Comments Here

[Save Comment](#)

There are no available notes

- This system should make it much easier for individuals to renew their membership. But there is another new feature for those choosing to renew the membership annually. They can select an auto renew button on the membership form that will automatically renew their membership each year during their renewal period using the same membership level and the same payment method. Anytime you want to cancel this option, contact the office and we can help make a change.
- We can now also offer membership in the 1% Group or the Power Hour Group where your membership dues are combined with your ministry gift and monthly dues. A charge is made to your credit card or checking account that will include your membership and your donation. This is the only way to do monthly donations in the new system, by combining it with dues that are billed on a recurring monthly basis.
- As I mentioned on page one we have had trouble tracking are current membership because we have allowed many lapsed members to remain active in the new system. They are past their expiration date, but when we go live in the new system these people will all get one more renewal notice. So on the table on the next page the number of active pharmacists and student pharmacists are much higher than what is really the case, because we want to reach out to some of these people who are in current lapsed categories.

- The new system will allow us to track membership through a dashboard where we can see the number of members in each group and how many new joined in the last 90 days:

Current Membership Rosters					New Members in the Last 90 Days	
Member Type	Lapsed	Graced	Pending	Active	Member Type	New Members
International	0	0	1	5	Pharmacist 1st Year Grad	0
Pharmacist 1st Year Grad	0	0	0	59	Pharmacist 2nd Year Grad	0
Pharmacist 2nd Year Grad	0	0	0	64	Professional	1
Professional	0	0	0	673	Professional Monthly - 1 Percent	0
Professional Monthly - 1 Percent	0	0	0	0	Professional Monthly - Power Hour	0
Professional Monthly - Power Hour	0	0	0	0	Student Pharmacist	0
Student Pharmacist	0	0	1	935	The School of Pharmacy	0
The School of Pharmacy	0	0	0	164	X-Professionals with Wings	0
Total	0	0	2	1939	Total	1
Prospect				8453	Prospect	8452
Total Active				10392	Total New	8453

- Notice we will be able to see how many are lapsed, graced, pending and active. Also we can see the number that joined within the last 30 days.
- We will also be able to monitor event registrations and financial status during the course of the year:

Past Event Attendance

Event Name	Date	Attended
Up to 3 events will be displayed here		

Upcoming Expected Event Attendance

Event Name	Date	Registered
CPII 2018 Annual Conference	05/31/2018	2

Financial Dashboard

Aged Receivables (updated: 5/17/2018 12:40:34 PM)

Total \$0.00

Sales Over Time (updated: 5/17/2018 12:40:34 PM)

Total \$0.00

- Nena and I have been working on this implementation since early last Fall. We are hoping that the system will go live on June 12th. We see how things go when we get back from the conference.

I will suspend the rest of my report to open up for question related to this report, and to present a motion to the Board.

Sincerely, in His service,
Ron Herman

Motion to the Board of Directors:

I move that we increase our membership dues for our regular member from \$100 to \$120.

Justification: Our dues have not increased I think in the past 2 decades This increase will make it easier for individuals that would like to take advantage of paying their dues monthly, instead of yearly combined with either a 1% Group membership or a Power Hour membership.

- 1% Group membership under the current system we would ask members to make an \$8.33 membership dues with a \$116.67 monthly donation for a total of \$125 per month.
- A Power Membership would be \$8.33 monthly membership plus the amount the giver want to give (approximately the hourly salary rate).
- It might be less confusing to people to say, OK I am going to pay \$10 per month dues and \$115 per month donation, rather than doing the above example.