

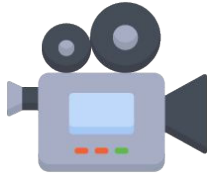
# Mastering Membership Management with Bloomerang

Bloomerang Academy

**Thank you for joining us today. We're glad you are here.  
Please tell us where you're joining from in the CHAT!**



# Housekeeping



**We're recording this webinar!** We'll send you a link to the recording and copy of the slides within 48 hours.

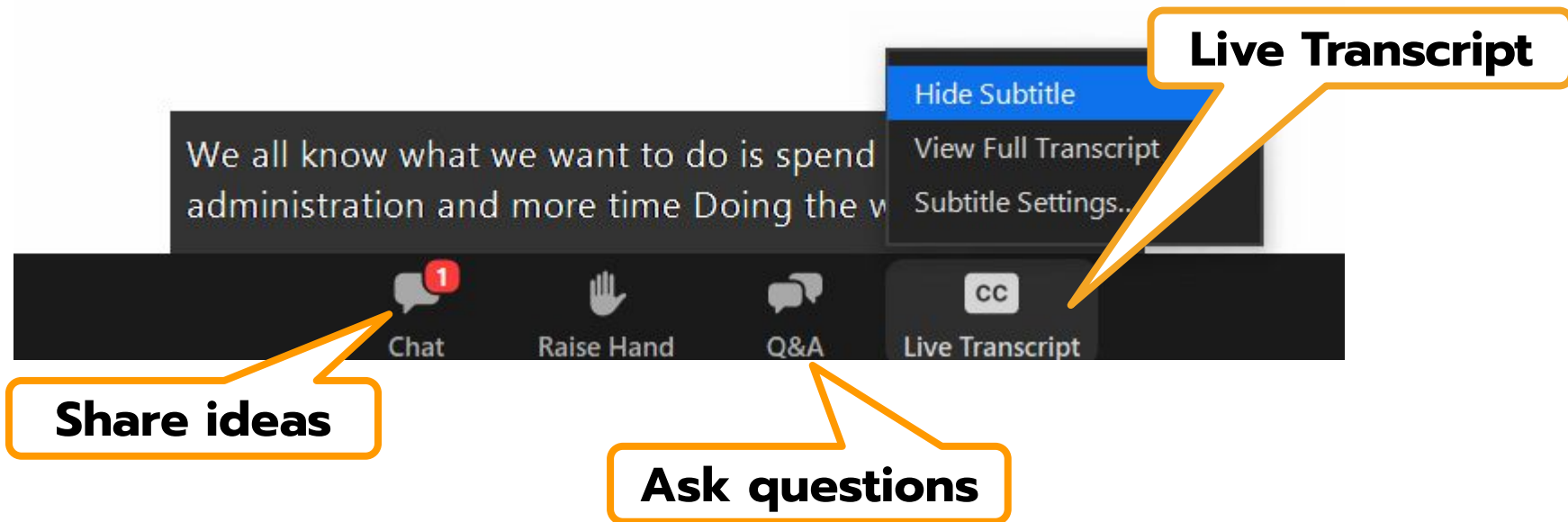


**Feel free to ask questions!** Use the Q&A option to ask questions and the chat option for general discussion. We'll answer questions at the end of the presentation.



**Share your highlights and takeaways** on your favorite social media channel and make sure to give us a follow!

# Housekeeping



The image shows a video player interface with a dark background. At the top, there is a subtitle: "We all know what we want to do is spend administration and more time Doing the v". Below the subtitle is a control bar with four icons: a speech bubble with a red '1' (Chat), a hand (Raise Hand), two speech bubbles (Q&A), and a 'CC' icon (Live Transcript). A dropdown menu is open over the 'CC' icon, showing options: "Hide Subtitle", "View Full Transcript", and "Subtitle Settings..". Three orange callout boxes point to the interface: one to the Chat icon labeled "Share ideas", one to the Q&A icon labeled "Ask questions", and one to the Live Transcript icon labeled "Live Transcript".

Our dial-in number in case you need it today: **+1 669 900 6833**

If you need more assistance, please reach out to [support@bloomerang.com](mailto:support@bloomerang.com).

**BLOOMERANG**

# Built for purpose

Giving platform designed to improve fundraising outcomes

**Easy-to-use tech,  
built for you**

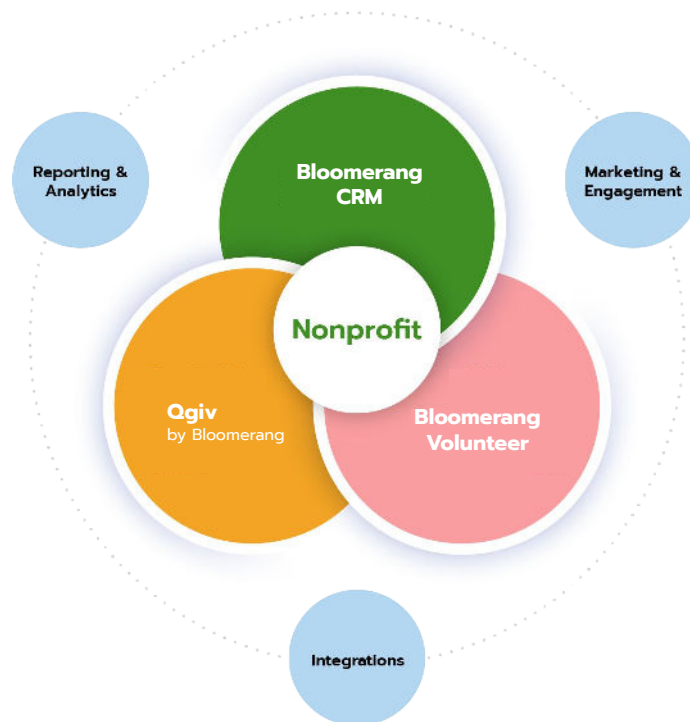
**Industry leading  
solutions**

**Insights that lead  
to better results**

**Engagement that  
inspires giving**

**Increase fundraising  
revenue**

**Automate and simplify  
day-to-day**





## VALUE

# Raise more

Engagement quality increases, effort decreases, and giving soars!

**30%**

Higher overall donation page conversion rates.

**\$108**

Average recurring gift, 4x the industry average.

**15%**

Increase in donor base year-over-year.

**\$180**

Average one-time gift, 50% higher than the industry average.

**25%**

Increase in recurring donor conversion rate.

**26%**

Increase in dollars raised year-over-year.

# Diana Otero

Sr. Product Marketing Manager

Diana Otero is a Product Marketing Manager at Bloomerang. She served on the board of the Nantahala Hiking Club, one of the 31 trail maintaining clubs of the Appalachian Trail Conservancy, a nonprofit driven and powered by volunteers. She is currently an active volunteer and auxiliary member of VFW Post 7119 in Indianapolis, IN, a nonprofit veterans service organization.



# Agenda

1. Bloomerang Membership Management
2. The Member Experience
3. Set up Bloomerang Membership
4. Communications
5. Reports
6. Resources & Q&A



We asked  
nonprofits like you:

*What's most  
important with  
memberships?*

1. Giving potential members a way to join online
2. Automatic annual renewals & non-deductible tracking
3. Automatically calculate members' statuses and upcoming renewal dates
4. Send multichannel membership communications (renewal reminders, invoices, welcome)



# Bloomerang Membership Management



Streamline Membership  
Management



Easily grow your  
membership



Steward members into  
donors



# Members can join online

- Form displays all the active membership levels in a program
- The amount and non-deductible amount are determined automatically
- Creates annually renewing transactions automatically
- Can use a page hosted by Bloomerang, or embed the form on your website

## Annual Membership

- \$45.00 - Conservation Champion
- \$100.00 - Guardian of the Wild
- \$250.00 - Legacy Leader
- Renew Annually

## Contact Information

First Name \*

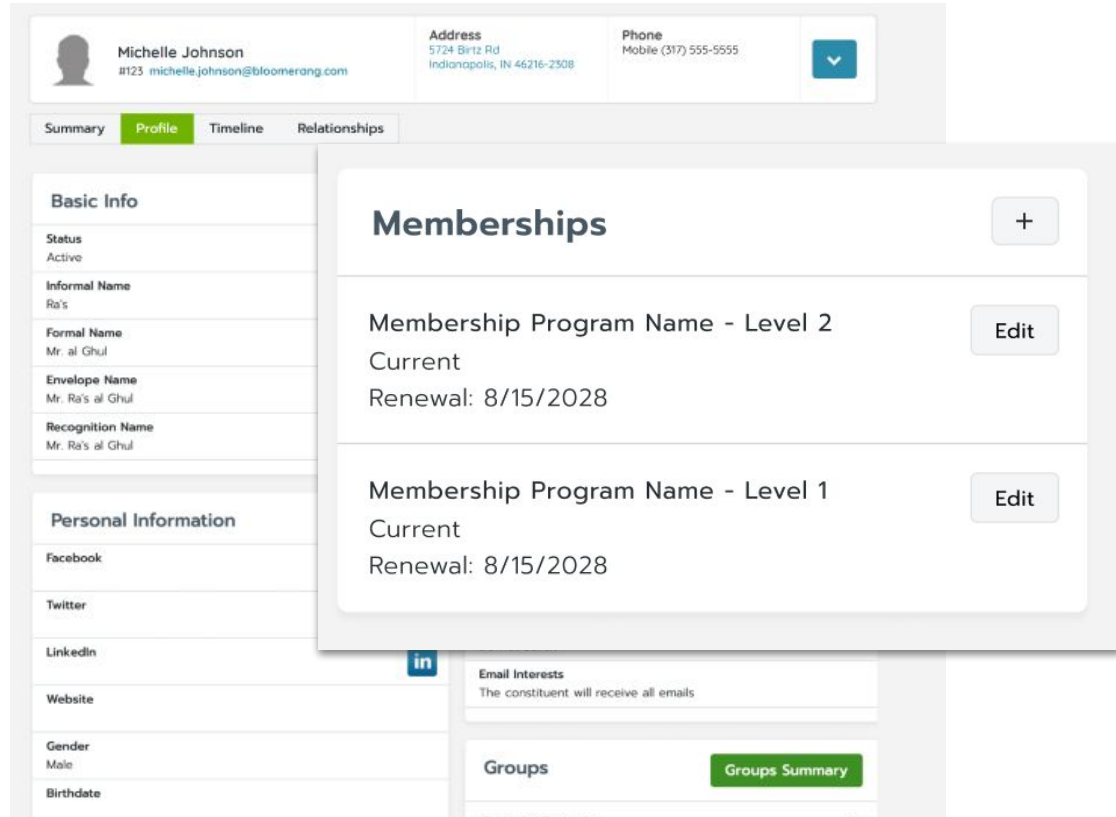
Last Name \*

Email \*

Phone

# Automatically calculate membership status & renewal date on constituent

- See a constituents' current and lapsed memberships easily
- Automatically calculated status and renewal date - no manual updates of custom fields
- Based on both online and offline payments
- Access this information in report filters



The screenshot displays a constituent profile for Michelle Johnson. The profile includes contact information, a navigation menu (Summary, Profile, Timeline, Relationships), and sections for Basic Info, Personal Information, and Groups. A modal window titled "Memberships" is overlaid on the profile, showing two active membership programs:

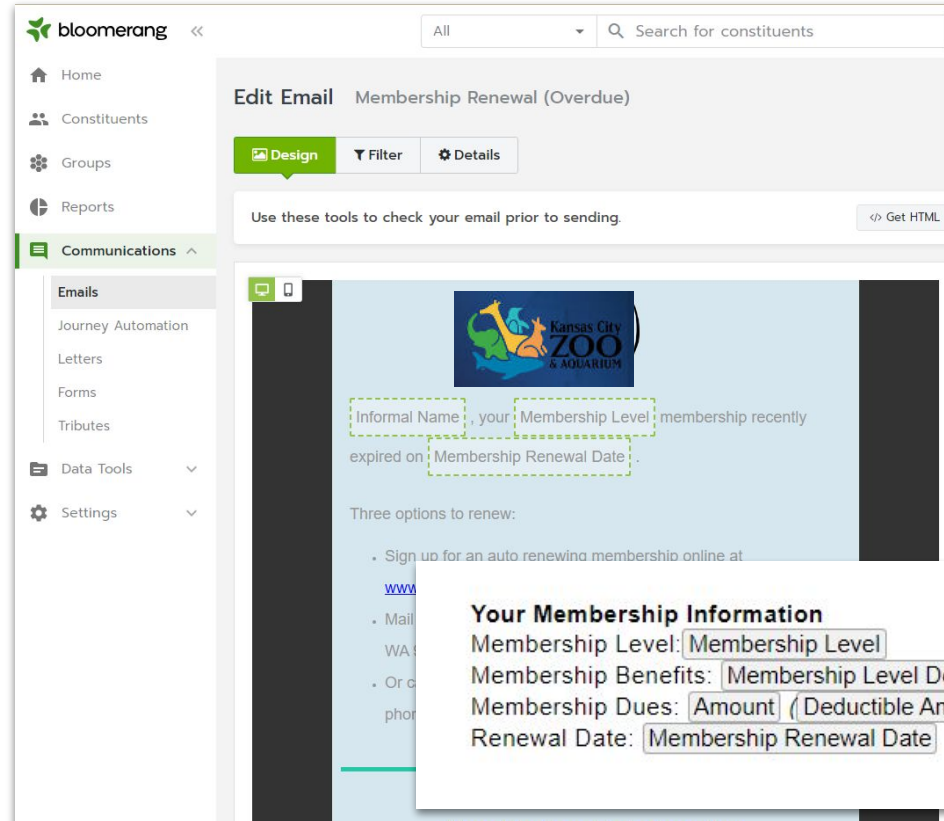
Membership Program Name	Status	Renewal Date	Action
Membership Program Name - Level 2	Current	8/15/2028	Edit
Membership Program Name - Level 1	Current	8/15/2028	Edit

The background profile details include:

- Basic Info:** Status: Active; Informal Name: Ra's; Formal Name: Mr. al Ghul; Envelope Name: Mr. Ra's al Ghul; Recognition Name: Mr. Ra's al Ghul.
- Personal Information:** Facebook, Twitter, LinkedIn, Website, Gender: Male, Birthdate.
- Groups:** Groups Summary button.
- Email Interests:** The constituent will receive all emails.

# Send multichannel membership communications (renewal reminders, invoices, welcome series)

- Multichannel renewal communications (emails & letters)
- Membership-related merge fields and filters
- Merge field for description so you don't need different templates for each level
- Use existing scheduled email feature



The screenshot shows the Bloomerang interface for editing an email titled "Membership Renewal (Overdue)". The left sidebar contains navigation options: Home, Constituents, Groups, Reports, Communications (expanded), Emails, Journey Automation, Letters, Forms, Tributes, Data Tools, and Settings. The main content area shows the email design tool with a preview of the email content. The preview includes the Kansas City Zoo & Aquarium logo, a greeting using merge fields for "Informal Name" and "Membership Level", and a section titled "Your Membership Information" with fields for "Membership Level", "Membership Benefits", "Membership Dues", and "Renewal Date".

**Membership Renewal (Overdue)**

Use these tools to check your email prior to sending. [Get HTML](#)

Informal Name: your Membership Level: membership recently expired on: Membership Renewal Date:

Three options to renew:

- Sign up for an auto renewing membership online at [www](#)
- Mail WA
- Or c pho

**Your Membership Information**

Membership Level: Membership Level

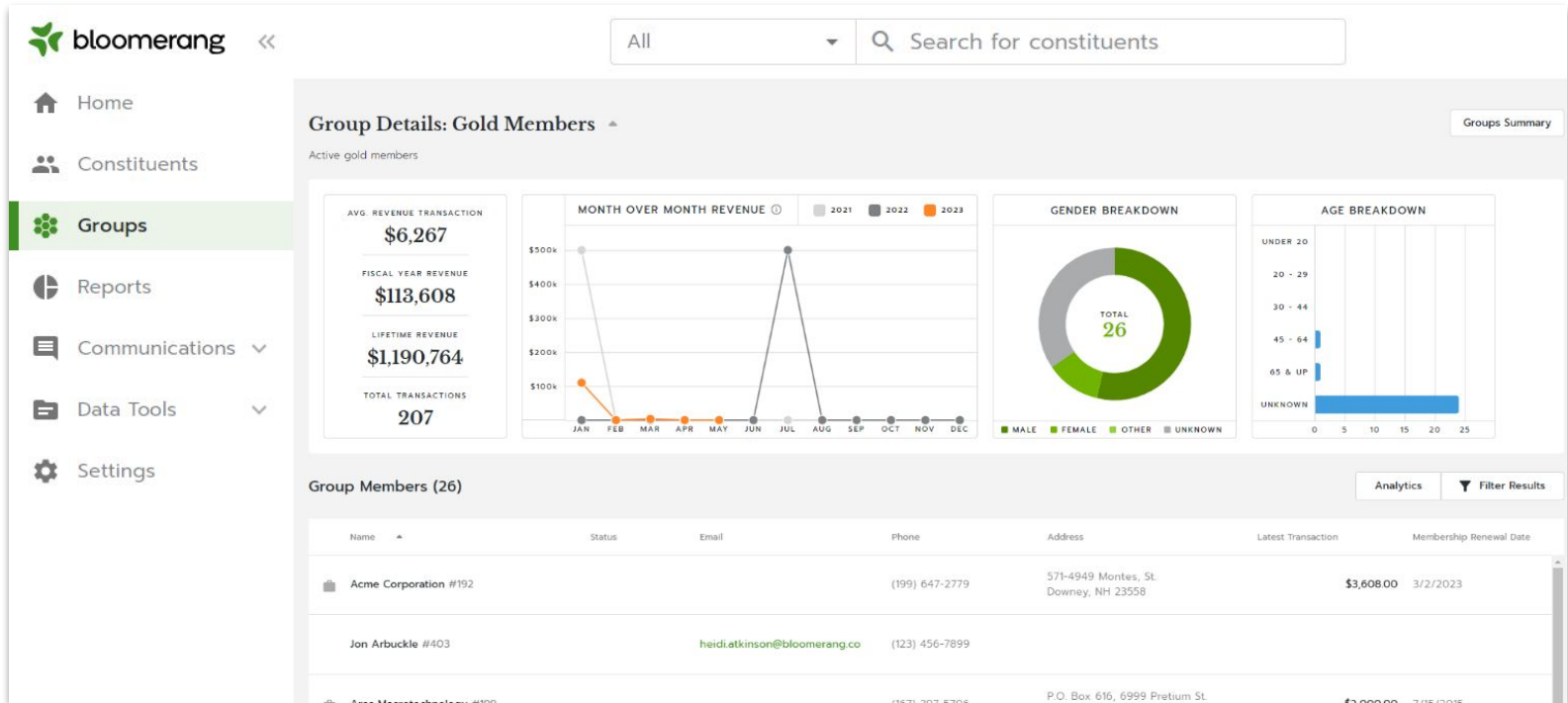
Membership Benefits: Membership Level Description

Membership Dues: Amount (Deductible Amount tax deductible)

Renewal Date: Membership Renewal Date

# Dynamic Membership Groups

System-defined dynamic group for each membership level



The screenshot displays the Bloomerang interface for a 'Gold Members' group. The left sidebar contains navigation options: Home, Constituents, Groups (selected), Reports, Communications, Data Tools, and Settings. The main content area is titled 'Group Details: Gold Members' and includes a search bar and a 'Groups Summary' button. Below the title, it shows 'Active gold members' and a summary of key metrics:

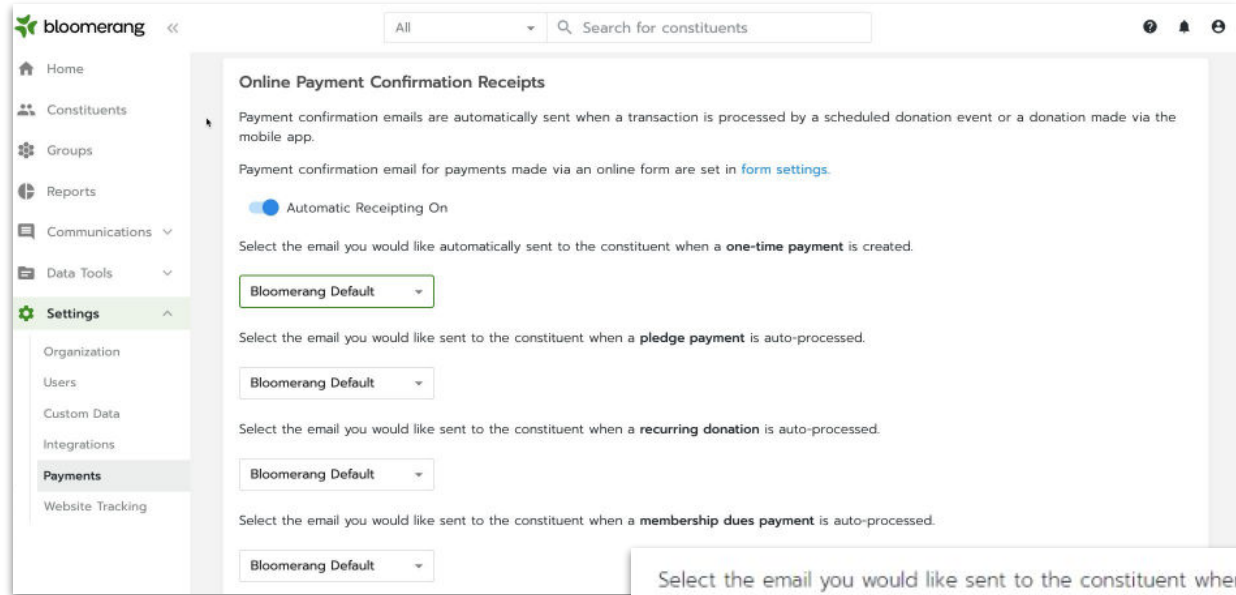
- AVG. REVENUE TRANSACTION:** \$6,267
- FISCAL YEAR REVENUE:** \$113,608
- LIFETIME REVENUE:** \$1,190,764
- TOTAL TRANSACTIONS:** 207

The 'MONTH OVER MONTH REVENUE' chart shows revenue trends from January to December for the years 2021, 2022, and 2023. The 'GENDER BREAKDOWN' chart is a donut chart showing a total of 26 members, categorized by Male, Female, Other, and Unknown. The 'AGE BREAKDOWN' chart is a bar chart showing the distribution of members across age groups: Under 20, 20-29, 30-44, 45-64, 65 & UP, and Unknown.

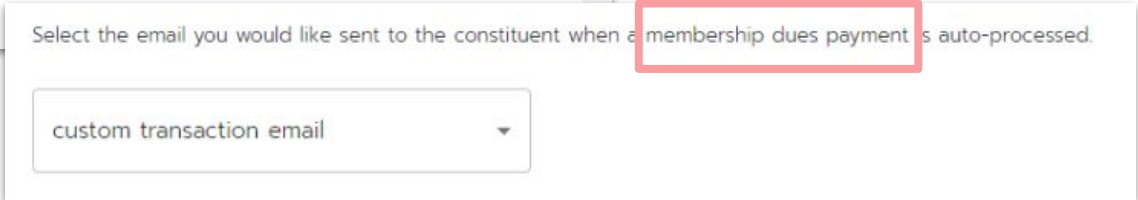
Below the charts, the 'Group Members (26)' section provides a table of individual members with columns for Name, Status, Email, Phone, Address, Latest Transaction, and Membership Renewal Date.

Name	Status	Email	Phone	Address	Latest Transaction	Membership Renewal Date
Acme Corporation #192			(199) 647-2779	571-4949 Montes, St Downey, NH 23558	\$3,608.00	3/2/2023
Jon Arbuckle #403		heidi.atkinson@bloomerang.co	(123) 456-7899			
Acme Membership #192			(123) 456-7899	P.O. Box 616, 6999 Pretium St	\$3,000.00	7/15/2025

# Automatic Email Receipts for membership dues payments



The screenshot shows the Bloomerang settings interface. On the left is a navigation sidebar with options: Home, Constituents, Groups, Reports, Communications, Data Tools, Settings (highlighted), Organization, Users, Custom Data, Integrations, Payments, and Website Tracking. The main content area is titled "Online Payment Confirmation Receipts". It contains the following text: "Payment confirmation emails are automatically sent when a transaction is processed by a scheduled donation event or a donation made via the mobile app." and "Payment confirmation email for payments made via an online form are set in [form settings](#)." Below this is a toggle switch for "Automatic Receipting On" which is turned on. There are four dropdown menus, each with the text "Bloomerang Default". The first dropdown is preceded by the text "Select the email you would like automatically sent to the constituent when a **one-time payment** is created." The second dropdown is preceded by "Select the email you would like sent to the constituent when a **pledge payment** is auto-processed." The third dropdown is preceded by "Select the email you would like sent to the constituent when a **recurring donation** is auto-processed." The fourth dropdown is preceded by "Select the email you would like sent to the constituent when a **membership dues payment** is auto-processed."



This is a close-up of the fourth dropdown menu from the screenshot. The text "Select the email you would like sent to the constituent when a membership dues payment is auto-processed." is visible, with "membership dues payment" highlighted by a red box. Below the text is a dropdown menu containing the text "custom transaction email".

# Membership available as its own transaction type

**Jay Barclay Love**  
 🏠 Love, Jay and Christie  
 #3 diana.otero+jay@bloomerang.co

**Address**  
 9120 Otis Ave  
 Indianapolis, IN 46216-2207

**Phone**  
 Work (866) 332-2999

**Relationship**  
 Manager  
 Diana Otero

Summary Profile **Timeline** Relationships

2024

- Email** November 26  
Receipt - Donation Confirmation
- \$9.00 Recurring Payment** November 26  
Unrestricted Annual Campaign
- Email** November 23  
Receipt - Donation Confirmation

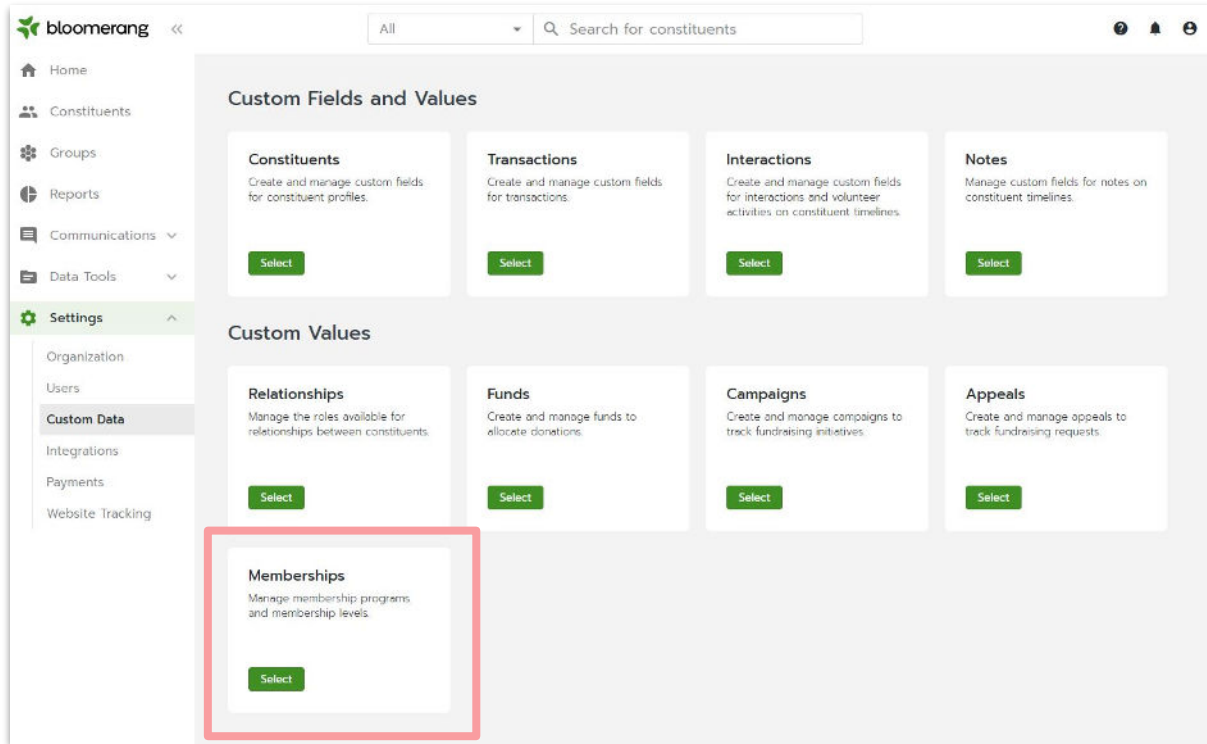
**Highlights**

- Upgraded from \$19,474.60 to \$20,698.26
- Has donated 14 years in a row

- New Donation
- New Pledge
- New Recurring Donation
- New Membership**
- New Interaction
- New Task
- New Note
- New Relationship

tasks notes

# Configure membership options in settings



The screenshot displays the Bloomerang settings interface. On the left is a navigation sidebar with the following items: Home, Constituents, Groups, Reports, Communications, Data Tools, and Settings (highlighted). Under the Settings menu, the following options are listed: Organization, Users, Custom Data (highlighted), Integrations, Payments, and Website Tracking. The main content area is titled "Custom Fields and Values" and is divided into two sections: "Custom Fields and Values" and "Custom Values".

**Custom Fields and Values**

- Constituents**: Create and manage custom fields for constituent profiles. [Select](#)
- Transactions**: Create and manage custom fields for transactions. [Select](#)
- Interactions**: Create and manage custom fields for interactions and volunteer activities on constituent timelines. [Select](#)
- Notes**: Manage custom fields for notes on constituent timelines. [Select](#)

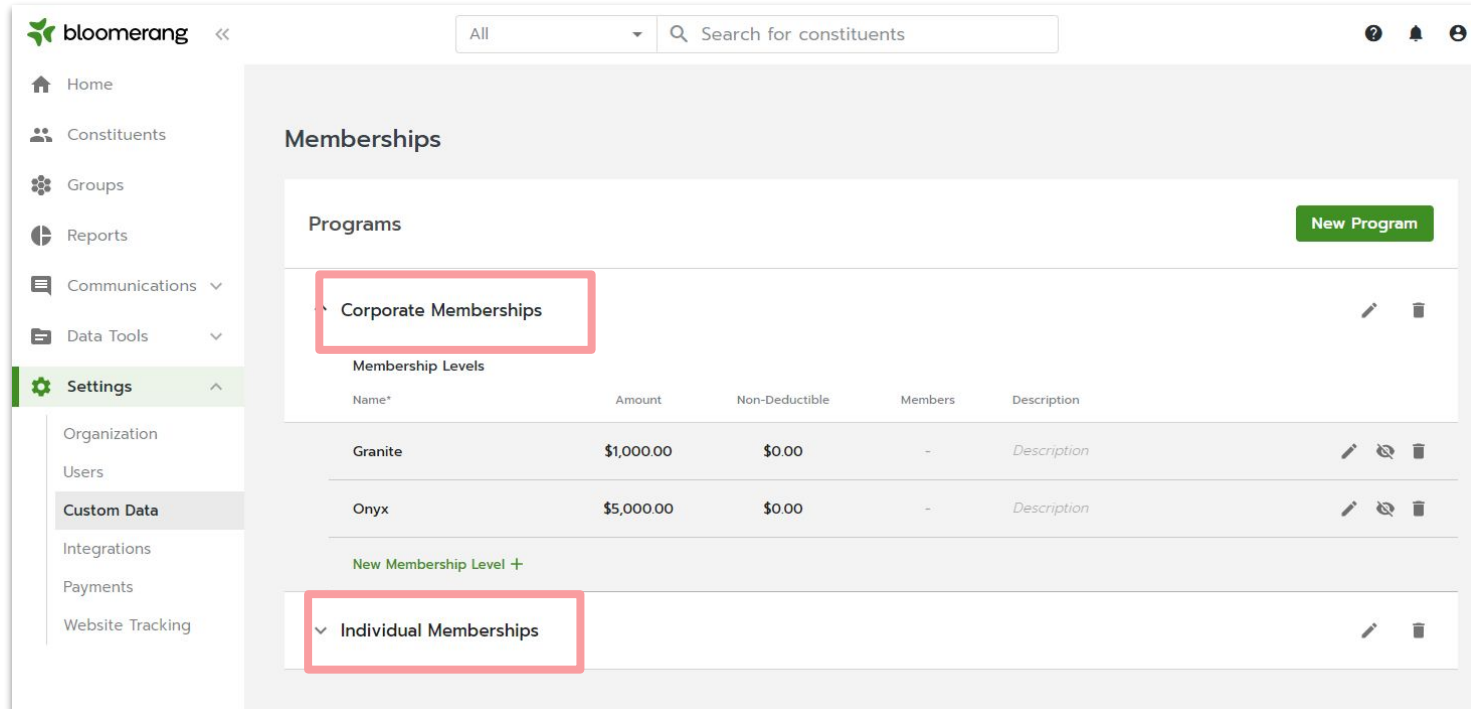
**Custom Values**

- Relationships**: Manage the roles available for relationships between constituents. [Select](#)
- Funds**: Create and manage funds to allocate donations. [Select](#)
- Campaigns**: Create and manage campaigns to track fundraising initiatives. [Select](#)
- Appeals**: Create and manage appeals to track fundraising requests. [Select](#)
- Memberships**: Manage membership programs and membership levels. [Select](#)

The "Memberships" option is highlighted with a red rectangular border.



# Create multiple Membership Programs as needed to group types of membership together

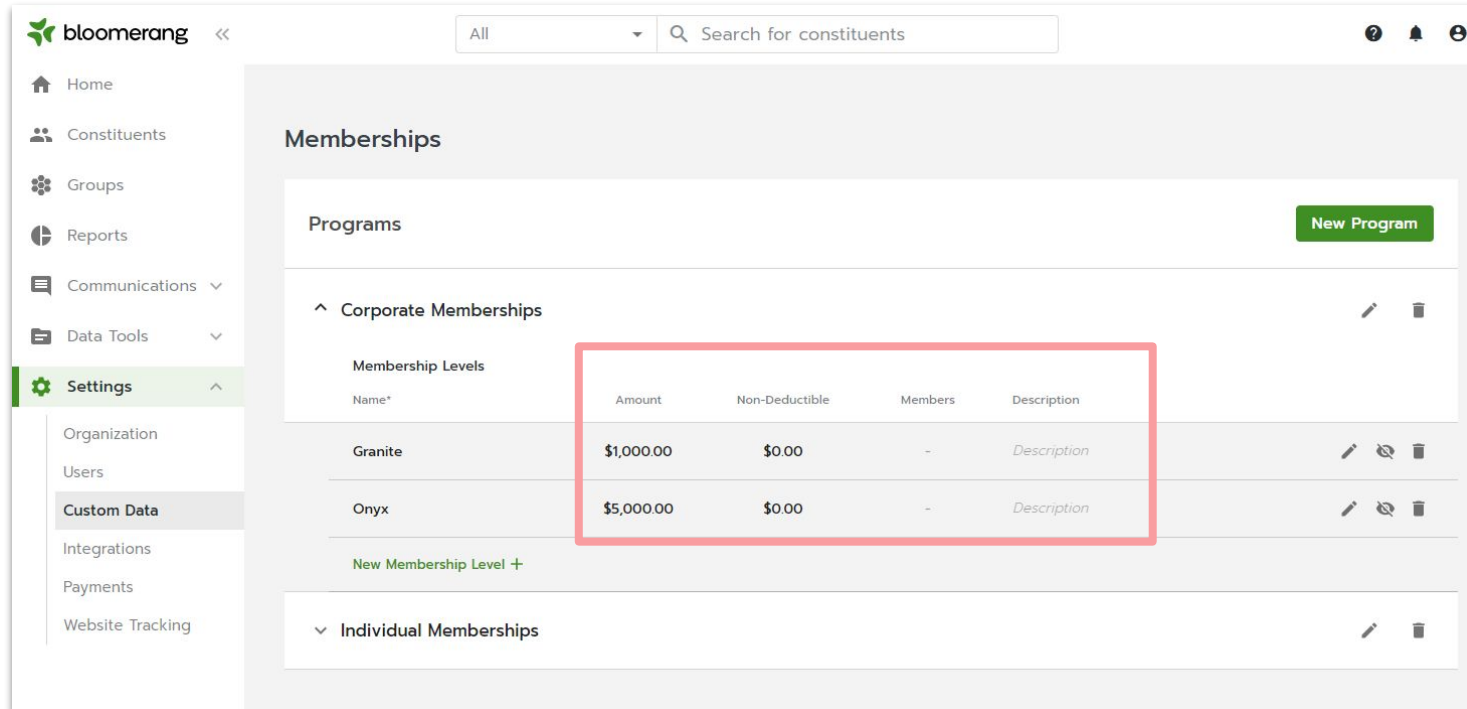


The screenshot displays the Bloomerang interface for managing memberships. On the left, the 'Settings' menu is expanded, showing options like Organization, Users, Custom Data, Integrations, Payments, and Website Tracking. The main content area is titled 'Memberships' and features a 'Programs' section with a 'New Program' button. A red box highlights the 'Corporate Memberships' program. Below this, a table lists membership levels:

Name*	Amount	Non-Deductible	Members	Description
Granite	\$1,000.00	\$0.00	-	Description
Onyx	\$5,000.00	\$0.00	-	Description

A 'New Membership Level +' link is visible below the table. At the bottom, another red box highlights the 'Individual Memberships' program.

# Track amount, non-deductible amount, and description for each membership level



The screenshot shows the Bloomerang interface for managing memberships. The left sidebar contains navigation options: Home, Constituents, Groups, Reports, Communications, Data Tools, and Settings (highlighted). The main area is titled 'Memberships' and includes a search bar and a 'New Program' button. Under 'Corporate Memberships', there is a table of 'Membership Levels'.

Membership Levels	Amount	Non-Deductible	Members	Description
Granite	\$1,000.00	\$0.00	-	Description
Onyx	\$5,000.00	\$0.00	-	Description

Below the table, there is a '+ New Membership Level' button. The 'Individual Memberships' section is partially visible at the bottom.

# Demo



# Resources

## Knowledgebase

[Membership Management](#)

[Plan Your Membership Program](#)

[Move from Custom Membership Tracking to the Membership Management Add-On](#)

## Bloomerang Blogs

[Elevate Your Nonprofit: Unlocking the Full Potential of Your Nonprofit with Unified Donor and Membership Management](#)

[The Psychology Behind Giving: Motivating Members to Become Donors](#)



# Thanks for joining!

More tools and resources to help you grow.

Connect with us!

[support@bloomerang.com](mailto:support@bloomerang.com)

Request a demo

[Bloomerang.co/demo](https://bloomerang.co/demo)

**New!** [Bloomerang Learning](#)  
on-demand training

Visit the Knowledge Base for  
more "how-to" articles.

We'd appreciate your feedback.

Fill out the post-session survey to let us know how we did.



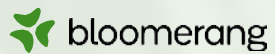
Help & Videos

Bloomerang Learning

Features Portal

Email Support

Refer a Friend



**Thank you!**

