



Southern Harvest Association Membership Database Specification

Purpose

This document outlines the requirements for a simple membership database to be set up to manage Southern Harvest Association membership details as well as to automate the process of sending renewal reminders and processing payments. This is particularly important in light of SHA taking over the functions of Permaculture eXchange and forming Southern Harvest Education.

Background

I am not sure how the current SHA membership database is maintained, but the Permaculture eXchange one is in a simple spreadsheet with manual entry and manual emails. I think the system needs streamlining so that renewals (and therefore income) can be performed in a timely and easy manner, and so that we are able to categorise different memberships, remove human error and build an actual database of members which are needed to feed into newsletter systems as well as the website itself for Business members and Producers.

Outline of requirements

A database with:

- Automatic population of as many fields as possible from the membership application form
- Fields to enter member details: First Name, Last Name, Business Name (if applicable), Postal Address, Business/Residential Address, Telephone, Email, Website
- Fields to enter Products, Interests (from drop/down and therefore can be used to generate lists)
- Joining Date
- Field for new members to say where they found out about Southern Harvest
- Renewal date and current status (ie current, outstanding, ended etc)
- Membership fees for different categories (manual entry or select from list?)
- Fields to enter payment details (ie to mark off payments made)
- Fields to enter membership types
- Field to go to newsletter subscription for new members
- Ability to send membership reminders by autogeneration of list
- Ability to email .pdf copy of membership certificates
- Ability to email .jpg images that certain members can use for printing
- A notes field to add comments to help with continuity between staff and volunteers
- Fields to enter member details which can then be published on the website*
- Integration with membership form on the website* (alternatively this can just be emailed to the membership secretary who can update.

* would like to have, not mandatory

Mandatory

Online system with login access so that different committee members can access.

Examples below of different 'screens' available on the SCPA membership database – obviously this needs customising to SHA...

Expression of Interest in performing this work

We require expressions of interest in performing this work by Friday 1 April 2016 by email to education@southernharvest.net.au including:

- An approximation of the number of hours involved and the hourly rate to be charged, giving a total project cost estimate.
- An outline of your experience building/developing similar projects
- An indication of your availability for follow-up consultation, fixing of any bugs etc
- Your availability ie over what period of time do you feel this could be completed.
- Any other relevant information or skill sets you bring to the project

Home New Member

Member List (356)

nr	name	address	email	any	search	reset
No	First Name	Last Name	Business Name	Postal Address	Mem.type	
1	Gary	Fishwick	South Coast Style Magazine	Unit 1/15 Moss St	unknown	
2	Garry & Deling	Kendall	F & J Family Orchards	Lot 47 Towamba Road	full	
3	Donna & John	Reid & Schooneveldt		PO Box 15	unknown	

Home Member List New Member

Show Member

First Name *	Penny & Paul	Last Name	Kothe & McKinnon
Business Name	Caroola Farm	Postal Address	'Caroola', 9074 Kings Highway
Town	Mulloon	State	NSW
Postcode	2622	Res Address	'Caroola', 9074 Kings Highway
Res Town	Mulloon	Res State	NSW
Res Postcode	2622	Home Phone	0248421899
Work Phone		Mobile Phone	0400165403
Fax Number		Email Address	penny@caroolafarm.com.au
Website	www.caroolafarm.com.au	Interests	Honey, Larger quantities of L2
Products	Beef, Lamb, Chicken, Ducks, f	Notes	
Skills			

Rural Tourism Loom Growers Seed Savers Gourmet Meats
 Organic Certification Vermiculture Scpa Market Bush Foods
 Herbs Other Markets Food Processing Spare Project4
 Spare Project5

Member Full full Member Organic Insurance

Joined 9 October 2013 Subs Due 10 October 2016

Subs Fee 165 Joining Fee

[Edit](#) [Payment](#) [Welcome email](#) [Renewed email](#) [Membership certificate](#) [Create renewal pdf](#)

Renewal due (26)

Select the members to send a renewal notice to. Members with an email address will have the renewal notice emailed to them. For Members without an email the system will generate PDF files that can be downloaded on the next page, then printed and posted.

<input type="checkbox"/>	No	First Name	Last Name	Business Name	Email	Mem.type	Org?	Subs Due	Fee
<input type="checkbox"/>	154	Dinner	Dark	John Dinner Dark	tonemark@artiva	full		04/05/2015	80

Reports

[Renewal due](#)

[Renewals sent](#)

[Overdue](#)

[Current](#)