MEMBERSHIPS

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1. Purpose

This procedure is to be accepted and observed by all members, staff and volunteers within Four Pillars. Breaches of the procedure may be regarded as gross misconduct.

2. Ownership

This is the Memberships of Four Pillars. The ownership of this procedure is to that of the Four Pillars board of trustees, who discharges its implementation to the management of Four Pillars. The management may discharge duties to a nominated member of staff or volunteer.

3. Statement of procedure

Our procedure is to provide guidance on processing memberships to employees, volunteers and service users. We also accept responsibility for all other people who may be affected by our activities.

4. Membership types

4.1 There are 5 membership types at Four Pillars, these are
4.1.1 Purple Membership
4.1.2 Blue Membership
4.1.3 Pink Membership
4.1.4 Free Membership
4.1.5 Volunteer Membership
4.2 The initial setup for memberships are the same, in most circumstances.

5. Setting up a membership

5.1 An email will be received when someone signs up for membership
5.2 Open Zeffy & sign in
5.3 Click contacts
5.4 Under Membership click show details
5.5 Click download
5.5.1 A membership card will open in PDF
5.6 Screen capture the QR code by zooming in, selecting windows+shift+s
5.7 Click on the pop up
5.8 Save pop up file to desk top (ensure it is unique)
5.9 Close members card
5.10 Open Base44
5.11 Scroll to Manage Members at the bottom of the screen
5.12 Type in password
5.13 Click add member manually
5.14 Type name
5.14.1 or copy and paste from Zeffy (recommended)
5.14.2 Click on upload image
5.14.3 Select saved QR code from desktop
5.14.4 Click add member
5.14.5 Close apps and delete QR code from desktop (unless needed to print card)

6. Manually adding a member

6.1 Sometimes members don't have an email and therefore can not sign up through Zeffy directly.
6.2 In these cases we need to manually add the member
6.3 Open Zeffy and sign in
6.4 Click on contacts
6.5 Click add new contact
6.6 Put in the persons name
6.7 Click save
6.8 Go to Campaigns
6.9 Select Memberships
6.10 Select Member list
6.11 Select add member
6.12 Select payment options
6.13 Select membership type
6.14 Type the persons name under "Link to a contact"
6.15 Select ticket type and click same as buyer information
6.16 Save
6.17 Now click on Contacts again and follow step 5 above
6.17.1 Zeffy will sometimes tell you it has created a duplicate, just follow the instructions to merge before following step 5

7. Creating a physical card

7.1 Some memberships come with a physical card, this helps identify the type of membership the person has and makes it a lot easier to use. (i.e. scan QR code)
7.1.1 Purple, Blue, Pink memberships all get a physical card as standard
7.1.2 Volunteers get a physical card for ID purposes
7.1.3 People with a Free membership can choose to pay a fee for a physical card
7.2 After creating the QR code and setting the member up on Base44 a card can be created
7.3 Open Badge Studio from the main desktop
7.4 Locate the front of the badge (name side) and press the play button
7.5 Select the right membership type
7.5.1 Ensure the member type on the card matches the colour selected. (i.e. Pink membership should be in a pink colour, free membership should be in a green colour and Purple membership should be in a purple colour)
7.5.2 To change this; select the "XXX MEMBERSHIP" on the card face (red box appears around the writing). On the right hand panel click the **A** then select the appropriate colour
7.6 In the text columns under the card, change the name, surname and date
7.7 Now place a glove over one hand and place a blank card in the machine *with the gloved hand.
7.7.1 fingerprints will show up on the printed card so cards can not be touched until complete
7.8 Press Print in the top left corner of Badge Studio, this will take you to a new page.
7.9 Press Print in the bottom right corner
7.10 Once the card is complete close the badge studio inner layer (X on grey screen top right)
7.11 Now open the back of the card (QR code) by pressing play

7.12 Select the QR code on the main badge face
7.13 On the right hand panel you'll see a small picture of the QR code, next to this is a file with a magnifying glass. Select that file
7.14 In the pop out window locate the QR code for the person you are creating the card for (this should be saved on the desktop already)
7.15 Now with the gloved hand, place the original card back in the printer
7.15.1 This should be faced down with the writing going from right to left
7.16 Press Print in the top left corner of Badge Studio, this will take you to a new page.
7.17 Press Print in the bottom right corner
7.18 Once the card is complete close the badge studio (X on white screen top right)
7.19 The card is complete and can be given to the member
7.20 Once finished, close down all apps and shut down the computer

8. Responsibilities

Overall and final responsibility for Memberships is shared collectively by the trustees.

The trustees delegate the responsibility of following this procedure to the management team.

The management will:

- Arrange for the implementation of this procedure in consultation with staff and volunteers
- Arrange for the adequate instruction and training of staff and volunteers in all matters related to this procedure
- Arrange for the contents of this procedure to be known to all staff and volunteers

The staff and volunteers of Four Pillars have a duty to:

- Follow this procedure
- Co-operate with the management to ensure that the requirements of relevant statutory provisions are complied with
- Report potential or actual hazards as soon as possible

9. Risk Assessment

The trustees will ensure that all risk assessments are undertaken for any part of the charity's activities to which they are applicable, copies of these risk assessments are available upon written request.

10. Premises

The management team will ensure that for all premises used by Four Pillars whether owned, leased or rented are:

- Health and safety compliant
- A full risk assessment has been completed
- Insurances are in place and displayed
- Fences are erect and secure at all times, if applicable
- Gates are manned at all times, if applicable
- Any potential danger is reported to the management

11. Reports

The delegated manager/person in charge at each event shall be responsible for making any necessary reports relating to this procedure or ensuring that others make such reports.

12. Procedure Development

The trustees shall endeavour to progressively develop the charity's procedure on Memberships use in response to risks and hazards identified. Specific procedures and policies so developed shall be appended to this document and form part of the charity's statement on reporting processing membership.

13. Review

The effectiveness of this procedure will be reviewed annually by a member of the Four Pillars board of trustees. If appropriate, action will be taken as necessary to update our procedure to ensure effective delivery on the objectives laid out at the start of this document.