



## The 519

### Challenge 1: Create a solution that enables The 519 to manage its members.

The 519 serves thousands of people each year through its programs, space and services. As a community-minded organization, its goal is to ensure that each person is able to connect with the opportunities that will best help them in their journey. As such, it's important to keep an accurate member profile of each person who engages with The 519 in order to share new information and resources with relevant persons as it becomes available. A new member management solution should have a low-barrier to entry so new members are not overlooked, and reports are easy to recall and update.

#### Ideal Features:

- Members have a profile that they can manage with their personal information
- Track client journey and engagement with the 519 (events, programs, other initiatives that the member has been involved in)
- Queries and reporting capabilities to segment users in order to send targeted communications (eg. Volunteer, donor, etc.)
- Privacy: Access to profile information should be tiered – only higher-level access personnel should be able to see sensitive information like phone number, address, etc. (see below for details)
- Highlight members that live within The 519's catchment area
- Allow option for New Member or Update Membership /Request Replacement Card
- Link to [The 519's donation page](#)

#### Profile Privacy:

There should be 3 levels of access: Volunteer, Staff & Administrator.

- Volunteer: Only able to view and export the information – possibly with an encryption password.
- Staff: Able to add other fields and create custom reports/exports.
- Administrator: Able to do all above, as well as remove/create access for users and able to disable the platform, as well as receive notifications for new registrants.

# Resources

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The key fields the Membership platform would need to track would be:

- Street Address
  - The format The 519 uses is “123-456 Church St” with the unit number in front, followed by the street number and name using an abbreviation for the street type and direction if needed.
- City, Province/State
- Country (if not Canada)
- Phone Numbers:
  - Mobile
  - Home
  - Work
- First Name, Last Name
- Email
- Is this Membership for an Individual or Household?
  - If Household; fields to provide are the partners/other members of households name and nature of the relationship:
    - Partner
    - Child/Parent
    - Roommate, etc.
- Birthdate
- What Programs or Services are they interested in?
  - Newcomer & Settlement Services
  - Queer & Trans Family Events
  - Family Resource Centre Drop-In Programs
  - Older LGBTQ Drop-In
  - Housing Support for LGBTQ Youth
  - Trans Youth Programs
  - Meal Trans
  - Sunday Drop-In
  - Volunteering at The 519
  - Green Space Festival
  - Special Events at The 519



# Resources

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(key fields continued)

- Permissions
  - Permission to contact via Email
  - Permission to contact via Mail
  - Permission to contact via Phone
  - Permission to Solicit (Send donation appeals)
- Opt in for The 519 Newsletter