

Finance Peer Group Session – What’s All the HUB About? March 7, 2024

- Agenda
 - Introductions
 - Poll
 - Community Hub add/join new/lapsed/transfer members
 - Shape the Future memberships
 - Dues categories
 - Community Hub – how to self-join for new and renewing members
 - Reviewing and reconciling your branch roster
 - Community Hub renewals and donations and payment methods
 - Q & A
 - Topics for next Peer Group session on June 6



Poll Questions:

- ❖ How do your existing branch members renew?
 - They use HUB
 - They pay by check
- ❖ How does your branch handle membership dues reminders?
 - We let National send out reminders to our members.
 - We request that National not send out the reminders as we send the reminders to our branch members.
 - We let National send out reminders and we also send reminders to our members.
- ❖ How do new members join your branch?
 - New members are given instructions to join using HUB
 - New members complete a membership form and pay by check.
- ❖ How does your branch pay on HUB?
 - Branch credit or debit card
 - ACH
 - We mail checks and ADR (Associate Dues Report) form to National & California



How to record members in the Community HUB



- Using HUB to add/join new/lapsed/transfer members.
 - [HUB Tools & Resources](#)
- Shape the Future campaign
- Dues categories

Special Membership Categories

- Shape the Future – new members who join at an event pay 50% National Dues – use Coupon Code – STF_FY24
 - [Shape the Future Campaign](#)
- Note – for every two Shape the Future members, the branch earns a free national membership – up to 3 per year – redeem using paper submission – must use by end of fiscal year
- Dual Members – to renew online, member must do herself to include multiple branches/states



Special Membership Categories – cont.

- Paid Life Members – No national dues – but State and Branch apply
- Honorary Life Members – 50 consecutive years of membership – must apply for status through national
- Student Dues – non-C/U member - \$18.81
National Dues applied if graduation date is in the future
- For C/U member school students \$0 national dues use coupon code CUSStudentFY24
- [Dues Schedule](#)



How new and existing members can use the Community HUB to join and renew their membership

- How to self-join for new members
- How to self-renew for existing members
- How to review and reconcile the branch membership roster
- [Self-Join](#)





New Member Enrollment

The following are the options available for a new member to pay the dues:

- Pay by check (traditional way)
- Self-Join in AAUW Community Hub (**Recommended**)

How to Self-Join New Member in AAUW Community Hub:

Community Hub allows the new member to create an account to make the membership payment.

<https://www.aauw.org/membership/new-systems-update/>

The Branch Membership VP and Finance Officer should inform new member to use Community Hub instead of paying with check.



Existing Members Enrollment

- <https://www.aauw.org/membership/new-systems-update/>

In past, the majority members paid their dues with the checks. Then, Finance Officer of the branch deposited the checks in the bank and disbursed state and national with the separate checks. The process was not efficient and the membership status update took longer time.

Therefore, the Community Hub approach is highly recommended.

How to Self-Renew Existing Members in AAUW Community Hub:

The Community Hub allows existing members to log in and renew their membership.

Monthly Review & Reconcile Membership Dues

The primary revenue source for each branch has derived from membership dues. Therefore, monthly reconciliation of the membership dues is very important.

Recommended Monthly Reconciliation Procedure:

- Deposit incoming checks for the month
- Incoming ACH payments from AAUW National
 - Reconcile membership roster with ACH payments and checks
 - Identify any duplicate payment issue

Monthly Reports

Each month, prepare the following reports prior to Board Meeting:

- 📊 Actual to Budgeted membership report
- 📊 Membership Roster report from Community Hub
- 📊 Research non-renewal issues (below highlighted)

Membership Roster sample is below:

Member ID	Member Type	First_Nam	Last_Name	City	State	ZIP	Join_Date	Exp_Date	Account Membership Status	Branch	Primary Branch
1000000	National	Abigale	Abel	Our Town	CA	90123	6/10/2019	6/30/2024	Current	CA0000-OurTown	Primary
1000000	National	Barbara	Brown	Our Town	CA	90123	2/6/2023	1/31/2025	Current	CA0000-OurTown	Primary
1000000	GraduateStudent	Connie	Carpenter	Our Town	CA	90123	1/31/2022	9/30/2023	Expired	CA0000-OurTown	Primary
1000000	National	Debra	Delaney	Our Town	CA	90123	10/3/2021	6/30/2024	Current	CA0000-OurTown	Primary
1000000	National	Ellen	Evans	Our Town	CA	90123	11/30/2023	11/30/2024	Current	CA0000-OurTown	Primary
1000000	HonoraryLifetime	Francine	Frontier	Our Town	CA	90123	7/1/1971	2/28/2174	Future	CA0000-OurTown	Primary
1000000	Lifetime	Gabrielle	Ground	Our Town	CA	90123	8/1/1994	12/31/2140	Future	CA0000-OurTown	
1000000	National	Isobel	Ford	Our Town	CA	90123	7/22/2013	6/30/2024	Current	CA0000-OurTown	Primary
1000000	National	Hester	Hamilton	Our Town	CA	90123	11/28/2022	11/30/2023	Expired	CA0000-OurTown	Primary
1000000	National	Jenny	January	Our Town	CA	90123	7/1/2003	6/30/2024	Current	CA0000-OurTown	Primary
1000000	National	Kirsten	Krinkle	Our Town	CA	90123	2/3/2023	1/31/2024	Grace	CA0000-OurTown	
1000000	National	Linda	Lady	Our Town	CA	90123	10/21/2014	8/31/2024	Current	CA0000-OurTown	Primary

Reconciliation Membership Dues Rules

How do I see my branch roster and determine who has paid or not paid for their membership?

President/administrators, membership vice presidents or finance officers can access your branch's roster and manage memberships (join/renew/transfer members) and donations on behalf of others.

President/administrators, membership vice presidents and finance officers can access the branch roster through their personal snapshot by choosing **MY AFFILIATIONS** from the menu on the left navigation.

Go to **MY AFFILIATIONS** > click the **blue button** to the right of your branch name to view the options > choose **MANAGE ROSTER**. Click **EXPORT ROSTER** to download and view member status.

How do you define the member statuses current, grace, and future?

Current is when you are within the 12 months of the membership from start/join date to end/expire date. Grace is 90 days after the end/expire date where a member can still renew without lapse in the membership. Future is when the membership is renewed beyond 12 months.

Reconciliation Membership Dues Rules

How do membership expiration dates work?

Please review the following table for a listing of join dates and corresponding expiration dates.

For renewing members, as long as you renew within your grace period which is three months after your expiration date, you will maintain your current expiration date.

JOIN BETWEEN 1ST AND 15TH OF: EXPIRATION WILL BE:

January	December 31, 2023
February	January 31, 2024
March	February 29, 2024
April	March 31, 2024
May	April 30, 2024
June	May 31, 2024
July	June 30, 2024
August	July 31, 2024
September	August 31, 2024
October	September 30, 2024
November	October 31, 2024
December	November 30, 2024

JOIN BETWEEN 16TH AND END OF: EXPIRATION WILL BE:

January	January 31, 2024
February	February 29, 2024
March	March 31, 2024
April	April 30, 2024
May	May 31, 2024
June	June 30, 2024
July	July 31, 2024
August	August 31, 2024
September	September 30, 2024
October	October 31, 2024
November	November 30, 2024



HUB Renewals and Donations for Branch Managers

- Branch presidents, membership vice presidents and finance officers can process dues and donations on behalf of members who pay the branch by check
- Payment methods
- [Renewals and Donations by Branch Managers](#)

Renewals and Donations by Branch Managers

- Many members provide a check to the branch for all their dues (National, California and Branch) as well as a donation to the Greatest Needs fund. These checks are deposited to the branch bank account.
- To record these memberships in HUB and pay the National and California dues, go to Renewals and Donations.
 - Click the pencil icon in the Renew column and click the box for each member you are renewing.
 - Click the pencil icon in the Donation Amount column to open and enter a general donation to AAUW Greatest Needs, if applicable.
 - After all selections and donations are made, download and review a copy of your selections by clicking Renewals and Donations Worksheet.
 - If all transactions are correct, click Pay Now.
 - Please do not attempt to process a payment if you believe it's incorrect. Please send an email explanation to connect@aauw.org so that HUB experts can further assist you.



Payment methods for HUB and submitting checks with the ADR report to National and California

- HUB
 - Branch credit or debit card
 - ACH for branch bank account
 - You must store new ACH banking information prior to starting the renewal process
- ADR – Affiliate Dues Report
 - Best to use HUB and pay by credit or debit card or ACH
 - If you mail in checks to National and California, send certified mail
 - [Affiliate/Additional Dues Report](#)



Q&A – Questions and Shared Experiences

❖ [Community HUB FAQ](#)





Next Finance Peer Group session is June 6

❖ What topics do you want to cover?

- What is your most time-consuming activity?
- What gives you the most trouble to complete?
- What are you curious about?
- What do you really want to talk about?