



Managing Clusters and Groups

In ActivityForum we have the concept of a hierarchical structure with a high level group managing and supervising groups at a lower level this is represented in this diagram.

At the top in blue is the Master Administration group; below this are all of the other groups in your cluster.

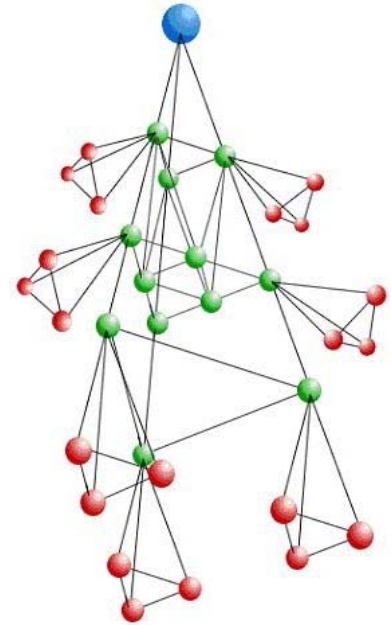
The Green nodes are sub groups to the Main groups the red nodes represent the membership.

In this diagram the main group has no members; there is nothing to prevent this group from holding your membership list.

Sub groups in the cluster can hold their own membership or share a member with another group.

For example you might keep your membership in the main group and associate some with different Groups. In this way you maintain a list of all of your members but permit local groups in a city for example to hold some local events.

Or for example have a number of groups that manage a local membership but are affiliated to the senior group. This affiliation may be paid for through an Affiliation fee.



Relationship

A group joined to another group through their relationship, this is normally where the senior group controls the sub-group. These relationships are normally set when the group is created and are determined by the Senior group who again normally creates a sub group.

Senior groups have rights in the subsidiary groups, for example a group manager has the same permission in the subgroup.

Associated Groups

Associated groups are groups that have a looser connection, for example the green groups that are at the same level may all be associated with each other as well as the Senior group. This works well where you wish to share information and collaborate at this level, but you can also associate with another group at a different level.

This all depends upon the logical structure of your group network and the physical location of the groups.

Assume that you have a business community that covers the UK and this is broken down into Regions, the top level group could have 7 regional groups, these then might have subgroups for major cities. Although this might sound overly complicated many groups like to maintain close local links for easy to get to events and support.

It also means the local membership can have a vibrant local group.

User Guide

Clusters & Groups



Membership

Your membership can be managed at the top level, this is nearly always the way this is implemented. The top level group contains the current list of you paying members. You have a significant level of control over your membership by maintaining them at the top level.

However, you may also have non paying members at this level, these might be:

- National Newspapers
- Professional Magazines
- Various Contacts in PR
- Various Contacts in National Politics
- Chairman of the local Chamber
- Councillors
- Local MP
- Newspapers etc

On the other hand local groups might be place to keep some of these with the top level reserved for National Contacts and local contacts in the local groups.

Joining

Most members will join online, you may initially load them from an excel spreadsheet or collect a list from an event but many should be encouraged to join online.

When they join there is a membership form that asks for the important details, other forms collect optional data.

When they join there is a **joining membership fee category** once you have their details this can be altered to a more appropriate fee category if necessary.

You can have a large number of fee categories; there is a 3 character field A – Z 0 – 9 which gives 30*30*30 combinations.

We provide a number of interfaces to Payment Service Providers (WorldPay, Secure Trading, Pay Pal) you still have the option for cheques, cash, standing order and DD (more information in Member Fee Categories User Guide)

Join to other Groups

You can join members to multiple groups, for example you would join a member from their top level group to their local group. This means their fees are collected at the centre but their local group may be where a significant part of their face to face activities takes place.

Fee category and membership date information is synchronised between all groups that contain fee paying members joined to the top level group.

Where a member joins a lower level group but joins as a National member then the fee category in the local level and the fee category of the top level are the same, in this case the member is automatically made a member of the top level group.

This ensures that a local group can recruit members at meetings etc and the details of join dates and renewals are maintained at the centre and visible locally. This means that overdue membership is visible at the local level and can be chased locally

Communications

ActivityForum contains a powerful mailing system this gives group managers the ability to mail all members in their groups and members in groups below them the mailing system has comprehensive selection criteria for membership mailing for both e-mail and post.