



# Guide to managing your membership program using Little Green Light



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# Introduction

If your nonprofit offers a membership program, your organization benefits from a reliable source of revenue and meaningful relationships with your supporters. Little Green Light provides a variety of features that you can use to manage your membership program.

In this guide, we'll explore how you can:

- Enable membership settings and define membership levels
- Track renewals on constituent records
- Record membership information during gift entry
- Acknowledge membership gifts and send renewal reminders
- Build an online form for memberships
- Report on memberships

## Section 1: What is a membership program?

Before getting started, it is important to understand what a membership program entails. The recommendations in this guide are intended for organizations whose bylaws define the organization as a membership organization or who offer distinct benefits like admission, discounts, and parking to members over a set period of time. These are the types of memberships typically offered by organizations like museums, historic houses, or land conservation organizations. If these circumstances do not apply but your organization uses the term “members” interchangeably with the word “donors,” we encourage exploring other options in LGL to track those donors.

And if you’re exploring the idea of starting a membership program, this guide can help you make an informed decision about whether a membership program is right for your organization.

# SECTION 1 RESOURCES

Best Practices: When to use the LGL Memberships setting

Should your organization start a membership program?

## Section 2: Tracking membership data in Little Green Light

We'll begin by taking a look at how Little Green Light's membership functionality works. The way your membership data is structured in Little Green Light will impact how you manage almost everything else involving memberships, from sending renewal reminders to pulling reports. If your data is not organized with a clear structure, simple tasks can become more difficult over time.

One important thing to note is that gifts and memberships are completely separate in LGL. This gives you the opportunity to track both paid and complimentary memberships. But the most common scenario is that a constituent pays for a membership for themselves. In that case, you will enter a gift record for their payment, and you'll also enter a membership record to track the membership level, start date, and end date.

### **Getting started: Enabling membership settings, adding membership levels, and managing expiration dates**

In order to create membership records, the first thing you will need to do is turn on the membership settings in your account's "Subscription settings" area. Then, it's time to set up your membership levels in the Constituent Menu Items section (in Settings > Menu Items)

Membership levels are typically tied to different price points and may carry different tiers of benefits. Keep in mind that membership is a common entry point to future philanthropic giving and it fosters a sense of belonging with your supporters. Someone who joins today as a student member may become a loyal supporter who renews yearly, attends events, and contributes volunteer hours over time. Offering a range of membership levels at different price points does not mean that you are leaving money on the table from those who could pay more—it means that your membership program is accessible to a wider pool of people who support your mission.

Before you start adding membership records, it's also important that you determine how your organization will handle expiration dates. Some organizations choose to offer set membership lengths such as monthly or yearly memberships that expire exactly one month or year from the start date. Other organizations associate memberships with calendar years, meaning that no matter when someone joins or renews, all memberships added that year will have the same set calendar-year end date.

## **Entering memberships in Little Green Light**

As mentioned, the most common scenario is that someone purchases a membership for themselves. In that case, you'll need to enter a gift record for their purchase, and also add a membership record. LGL makes this process simple by giving you the ability to set up the membership record right from the gift entry screen.

## Recording a payment for a membership

When you enter membership payments, you'll need to code these gift records in a way that makes it easy to distinguish them from other gifts in your database. This way, you'll be able to easily report on how much money you've raised through your membership program, and you can compare totals from one year to another.

A straightforward way to code your gift records is to use a gift category. In your gift menu items (Settings > Menu Items > Gift Menu items), you can add a gift category named "Membership". Then, anytime you enter a membership payment, you can assign this gift category to the gift record.

Once you've entered information about the membership payment, you can scroll down on the gift entry screen to enter the membership information.

## Recording a membership record

Once membership settings are enabled in LGL, you'll see a membership section when you scroll down on the gift entry screen. Here you can select the membership level as well as the start and end dates of the membership. A membership level and a start date must be entered in order to create a membership record.

> Add/update membership information

You can add or update the membership information for this constituent, if appropriate.

| Membership                  | Start Date             | End Date               | Note        |                    |
|-----------------------------|------------------------|------------------------|-------------|--------------------|
| <div>Student (\$25) ▾</div> | <div>2026-01-01 </div> | <div>2027-01-01 </div> | <div></div> | <div> Remove</div> |
| <div>+ Add membership</div> |                        |                        |             |                    |

An important consideration is how membership records will be updated when a current or previous member renews. There are two different ways you can approach this in Little Green Light, and while neither approach is right or wrong, you'll set yourself up for success if you stay consistent with your chosen approach.

If you would like to track historical membership, meaning that a member's previous membership levels and dates will be retained over time, you should add a new membership record for every renewal.

▼ Related Information

Membership

Family (\$85) : 3/21 to 3/22

Family (\$85) : 3/20 to 3/21

Individual (\$50) : 2/18 to 2/19

 Edit membership

Example of a constituent record with historical membership data

You will see a full history of a constituent's membership levels, start dates, and end dates in the "Related Information" section of the constituent record. This level of visibility makes it possible to identify patterns such as changes in membership levels, which is a great way to discover constituents whose interest in your organization or capacity to give may have increased over the years.

You'll also have a bit more insight into lapsed and recaptured members as well as the ability to search for constituents based on membership start or end dates in the past.

Advanced Search

Show constituents where

Saved Searches: ----- My searches -----

All of the following are true

Restrict by: Event Appeal

Membership dates

Custom dates

2021-01-01 to 2021-12-31

Search: Start Dates and First membership

Membership status

Current/Active

Add more criteria · Advanced options

Save this search

New Search

Search

A constituent search yielding current members whose first membership began in a previous year

**TIP:** Current/Active and Former/Inactive membership statuses are automatically calculated by Little Green Light based on membership end dates. You can use membership status to filter your constituents or as a parameter in constituent searches.

If your organization prefers a streamlined look on your constituent records, you may choose to only keep a record of the currently active or most recent membership. You can do this by simply editing the existing membership record and updating the end date and other information as needed.

Related Information

Membership

Individual (\$50) : 8/25 to 8/26

Edit membership

Example of a constituent record with a single membership record

While you lose some visibility of historical membership data using this method, you are not completely out of options because you can still track the membership gifts.

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## Gift, complimentary, and lifetime memberships

The majority of your membership transactions will be for memberships purchased by the person or household who will use the benefits for a distinct period of time, such as one year. Gift, complimentary, and lifetime memberships are some exceptions that can benefit your organization in other ways.

Offering the option to purchase gift memberships is a great way for your loyal supporters to introduce your organization to their friends and family. In these cases, the gift record should be attributed to the person paying for the membership. Once you've entered the gift record and saved it, you'll need to add a membership record for the person receiving the benefits. You'll need to create a constituent record for that person if one does not exist already. To manually add a membership record for them in LGL, navigate to their constituent record and scroll down to the "Related Information" section.

When the membership settings are enabled in your account, the "Related Information" section will contain a "Membership" section with an "Add membership" option (if the constituent does not already have a membership record) or an "Edit membership" option (if the constituent does have a membership record) directly below the field. You'll be required to select a membership level and enter a start date to save a membership record.

**Note:** Both gift records and membership records offer "Note" fields that can be used to record the context behind a complimentary membership.

# Gift details

Rogers, Fred > \$85

| Gift details:                                                |              |
|--------------------------------------------------------------|--------------|
| Constituent                                                  | Amount       |
| Rogers, Fred                                                 | \$85         |
|                                                              | Deposited    |
|                                                              | \$85         |
| Category                                                     | Payment type |
| Membership                                                   | Credit Card  |
| Gift Date                                                    | Deposit Date |
| Jan 1, 2026                                                  | Jan 1, 2026  |
| Gifted Membership TY - With Tax Language: Jan 5, 2026 : Sent |              |
| Notes/Description                                            |              |
| Gift membership for Bob and Judy Brown                       |              |

A gift record representing a membership that was purchased for someone else

▼ Related Information

Membership

Family (\$85) : 1/26 to 1/27 Gift membership from Fred Rogers

Edit membership

A gift membership record containing a note with additional context

You may also extend complimentary membership benefits to an individual who has helped your organization in some way, such as a student intern. In this case, there won't be any need to create a gift record, so you can go ahead and add a membership record for the person receiving the complimentary gift and use the "Note" field to enter any relevant details.

Lifetime memberships allow your supporters to make a significant one-time contribution in exchange for a membership that never expires. There isn't a set rule for how you should price your lifetime memberships, but think of it like a major giving opportunity especially positioned for your members.

Little Green Light requires only a membership level and start date when you add membership records, so you can track lifetime memberships by using a "Lifetime" membership level and leaving the membership end date field blank.

▼ Related Information

Membership

Lifetime : 1/26 and beyond

 Edit membership

A lifetime membership record with an open end date

## SECTION 2 RESOURCES

[Best Practices: When to use the LGL Memberships setting](#)

[Tracking memberships](#)

[Organizing your campaigns, funds, appeals, events, and gift categories](#)

[Gift categories and custom gift fields](#)

## Section 3: Communicating with members

Now that you've started entering memberships in Little Green Light, it is time to think about how you will be using LGL to communicate with your members. A proactive membership program will send timely welcome letters to members when they join or renew and thank them for their membership gift, if applicable. These same members should also receive any membership newsletters that your organization sends and renewal reminders as their membership end date approaches. That might sound like a lot of work, but if you prepare dedicated templates for your printed letters and emails ahead of time these processes can be simple and routine.

### Acknowledging membership gifts and welcoming new members

When you receive a membership gift, the person who gave the gift should be thanked promptly and the person receiving the membership benefits should be welcomed to your organization. In most cases, this will be the same person (or household) and you can set up your acknowledgment templates to accomplish both goals in a single communication.

When you create dedicated acknowledgment templates for membership gifts, your goal should be to let members know the following information:

- **The length of their membership and summary of their membership benefits.** While this information may already have been available when the member signed up, this can serve as a reminder of why members should use their benefits. The more a member engages with your organization, the more likely they are to renew.

- [What to expect next.](#) Will the member be receiving anything additional in the mail, like membership cards, parking passes, or publications? Let them know to keep an eye out for those materials!
- [What does their membership gift make possible for your organization?](#) While membership gifts are more transactional in nature than standard donations, this is an ideal opportunity to remind your members of how they are making a difference.
- [Whether the membership gift is tax-deductible;](#) if it is, be sure to include information like the date of the gift, the deductible amount, a statement that no goods or services were exchanged, and a statement that your organization is a tax-exempt nonprofit organization recognized by the IRS under Section 501(c) (3). For a deeper dive on acknowledgments, check out our [Guide to Acknowledging Gifts](#).

Here’s a sample membership acknowledgment letter:



ANYTOWN  
CONSERVATION TRUST

Joshua Woods  
100 Second Street  
Anytown, USA

Dear Joshua,

Thank you for becoming a member of Anytown Conservation Trust! We received your tax deductible membership gift of \$85 on March 10, 2026. Your new **Family** membership cards, valid through **March 31, 2027**, are enclosed.

As a member, you are helping us to protect essential habitats for wildlife and make the woodlands, marshes, and coastline more accessible for our community now and generations to come. Your membership gift also unlocks these great benefits:

- Free admission and parking to all of our 50+ properties
- Discounts in our shops
- Quarterly member magazine
- Access to exclusive member events

We will keep you informed of our activities through our quarterly membership magazine and our monthly email newsletter. If you have any questions about how to make the most of your membership, please reach out to us at [memberships@anytowntrust.org](mailto:memberships@anytowntrust.org).

We greatly appreciate your support and hope to see you outdoors soon!

Thank you for joining,

*Miranda Salmon*

Miranda Salmon  
Membership Director

No goods or services were received in return for this donation

Anytown Conservation Trust is a public charity recognized as tax-exempt by the IRS under Section 501(c)(3)

Anytown Conservation Trust | P.O. Box 123, Anytown, USA | Federal Tax ID: 12-3456789

For members who received a gift membership or complimentary membership, you won’t be sending them a gift acknowledgment but you can create a general letter template that’s used to welcome them as members and share details about their benefits.

## Managing renewals

Renewal reminders are another major touchpoint that you will have with your members, so it's important to approach these reminders thoughtfully. Not only should the language that you use in your renewal reminders express your continued gratitude for your members, but the timing of your communication with them should be factored in as well. Nobody wants to receive a reminder at the last moment or feel rushed into renewing. Aim to send at least two reminders, with your first reminder going out at a minimum one month in advance and a second reminder during the month in which the membership expires.

With Little Green Light's ability to search using relative date ranges, you can streamline your renewal process by creating saved searches that you can re-run every month to find your members who are expiring that month and in the next month. Then, you can pull the expiring members who appear in the search results directly into a mailing or email.

You'll want to set up your searches using the "Membership dates" parameter and select relative date ranges like "Next month rel." and "This month rel." These stand for "next month relative to today" and "this month relative to today". There will also be options after the date range to define whether you want to base your search on "Start" or "End" dates and if you want to search for the constituents' "First" membership, "Latest" membership, or "Any" membership. Be sure to select the "End Dates" and "Latest membership" options here so that your search results include only the constituents whose most recent membership is expiring.

Advanced Search

Show constituents where

Saved Searches: ----- My searches -----

All of the following are true

Membership datesNext month rel. next month to next monthSearch: End Dates andLatest membership

Add more criteria · Advanced options

Save this searchNew SearchSearch

A constituent search that yields members whose membership will expire in the next month

Advanced Search

Show constituents where

Saved Searches: ----- My searches -----

All of the following are true

Membership datesThis month rel. this month to this monthSearch: End Dates andLatest membership

Add more criteria · Advanced options

Save this searchNew SearchSearch

A constituent search that yields members whose membership will expire in the current month

After you create your initial search, you can click the “Save this search” button to save it for future use. You’ll also see “Send mail” and “Create email” options above the “Advanced Search” area, which you can click to begin building your mailing or email list.

**TIP:** You can add the “Membership Summary” widget to your dashboard. This widget displays the numbers of active members, new members this fiscal year, members with expiration dates this month, members with expiration dates next month, and members whose memberships have expired this fiscal year. If you click on a number in that widget, you’ll be directed to the pre-built constituent search used to generate that number.

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| Membership Summary       |  | ↓                                                                 |
|--------------------------|--|-------------------------------------------------------------------|
| Active Members           |  | 49 constituents                                                   |
| - New this fiscal year   |  | 18 constituents                                                   |
| - Expiring this month    |  | 4 constituents                                                    |
| - Expiring next month    |  | 4 constituents                                                    |
| Expired this fiscal year |  | 5 constituents                                                    |
|                          |  | Last updated: June 26, 2026 at 12:41 PM · <a href="#">Refresh</a> |

Membership Summary widget on the LGL Dashbaord

As with your welcome letters, your renewal reminders should provide both practical information and gratitude. You should prepare general letter templates or email templates for this purpose, which (unlike the acknowledgment templates for your welcome letters) will not be tied to gift records. Make sure that your members know exactly when their benefits will expire and remind them of the impact that their membership had.

Here’s a sample membership renewal letter:



Joshua Woods  
100 Second Street  
Anytown, USA

Dear Joshua,

We are so grateful for your support of Anytown Conservation Trust. During the past year, you’ve helped us to protect over 1,200 acres of conservation land and ensure that these special places remain accessible for our local community and visitors alike. This is only possible thanks to the generosity of members like you.

**That’s why we’re asking you to renew your Family level membership today, which will expire on June 30<sup>th</sup>.**

Your tax-deductible membership gift provides a year of free admission and parking to all of our 50+ properties, discounts in our shops, and access to exclusive events. To renew, please return the included remittance form with your gift or payment details in the envelope provided or fill out the form on the Membership page of our website.

If you have any questions about renewing your membership or membership benefits, please reach out to us at [memberships@anytowntrust.org](mailto:memberships@anytowntrust.org).

Thank you again for being a member and joining us in protecting nature for future generations.

With gratitude,

*Miranda Salmon*

Miranda Salmon  
Membership Director

## Making it easy to join or renew

You'll also want to make joining or renewing as easy as possible. If you are sending letters in the mail, include a form that recipients can fill out as soon as they open your letter, a remittance envelope pre-printed with your organization's mailing address, and if possible pre-paid postage.



**ANYTOWN**  
CONSERVATION TRUST

**Your membership makes a difference!**

Renew today by completing this form or visiting our website

**Please renew my membership at the following level:**

☐ Family - \$85

☐ Individual - \$50

☐ Senior - \$40

☐ Student - \$25

**Primary member name**\_\_\_\_\_

**Additional member names**\_\_\_\_\_

**Street**\_\_\_\_\_

**City**\_\_\_\_\_ **State**\_\_\_\_\_ **Zip/Postal code**\_\_\_\_\_

**Phone number**\_\_\_\_\_

**Email address**\_\_\_\_\_

**Payment information**

☐ My check is enclosed

☐ Please charge my card

**Credit/debit card number**\_\_\_\_\_

**Cardholder name (if different from primary member)**\_\_\_\_\_

**Expiration Date**\_\_\_\_\_ **CVV**\_\_\_\_\_

Anytown Conservation Trust members are tax-deductible. For a full description of membership levels and benefits, please visit our website or get in touch with our team at [membership@anytownconservation.org](mailto:membership@anytownconservation.org).

Anytown Conservation Trust | PO Box 123 Anytown, USA | Federal Tax ID: 12-3456789

Example of a renewal form that might be included with a mailed letter and remittance envelope

You may also want to send renewal reminders by email. With Little Green Light's direct email feature, you can search for constituents with expiring or recently expired memberships and then easily pull them into a bulk email from your search results. Membership emails should always include a link to an option to renew online.

Regular member newsletters or emails are an excellent way to keep in touch with your current members and encourage them to use their membership benefits. Since LGL automatically tracks current members based on the membership end dates, you can pull your newsletter lists with simple searches that use the “Membership Status: Current/Active” parameter.

Depending on whether the newsletter is mailed or emailed, we also recommend including either the “Can send mail?” or “Can send email?” parameter. These search parameters will yield constituents who are not marked deceased, who have a valid mailing/email address, and who are not tagged with the system “do not mail”/”do not email” communication tags.

Advanced Search

Show constituents where

Saved Searches: ----- My searches -----

All of the following are true

Restrict by: EventAppeal

Can send email?

Membership status

Current/Active

Add more criteria · Advanced options

Save this search

New Search

Search

A constituent search that yields current members who can and want to receive emails

## Setting up an online membership form

The general rule of thumb is that you should provide a way for recipients to take a similar reply action as soon as they receive a communication from you.

If you send out communications by email or include a link to your website on your mailed letters, you should offer an option for people to join or renew online. Otherwise, you risk losing members who may find it inconvenient to complete a physical form.

We recommend creating a membership form using LGL Forms and linking it to Little Green Light so that your form data creates gift and membership records, reducing the amount of manual data entry needed on your end.

LGL Forms is not a payment processor, so the first thing you'll need to do when you go to LGL Forms is connect a payment processor (compatible options include Stripe and PayPal), which will enable the option to create payment forms. When you create a new form, be sure to select the "Donation/Payment" form type in the "Form Settings" area.

Then, you can create a basic membership form:

## Become a member today!

Choose your membership level: \*

- ☐ \$85 - Family
- ☐ \$50 - Individual
- ☐ \$40 - Senior
- ☐ \$25 - Student

### Contact Information

Name \*

First Name

Last Name

Email \*

Address

Address Line 1

Address Line 2

City

State/Province

ZIP/Postal Code

Country

Enter payment information

Once you've built out the form, the next step is to map it to LGL so that the information flows to your database and you won't need to enter it manually. You may be eager to start sharing your form once all of the mappings have been added, but before doing so it is a good idea to thoroughly test the mappings.

You can submit as many tests to the form as you want without including a payment. These will be recorded as unpaid form submissions, which can be manually synced to Little Green Light so you can review the mappings.

**Note:** An account setting that causes each membership submitted through an LGL form to create a new membership, rather than extend an old one, can be turned on in your account if desired. (If this setting is NOT turned on, an existing membership is automatically extended by one year in a form when the membership level in the form data matches a membership level already in LGL.)

## SECTION 3 RESOURCES

[Acknowledging gifts in LGL](#)

[Saved searches](#)

[Create an acknowledgment letter template](#)

[Create an email acknowledgment template](#)

[\(General\) Letter templates](#)

[\(General\) Email templates](#)

[Guide to Acknowledging Gifts](#)

[How to streamline membership renewals in LGL](#)

[Sending email directly from Little Green Light](#)

[Enable your LGL Forms account to accept PayPal payments](#)

[Enable your LGL Forms account to accept Stripe payments](#)

[Build and map a basic membership form](#)

[How can I test a payment form without actually making a donation?](#)

# Section 4: Reporting

When you code membership payments so that you can distinguish them from other gift records, such as by using a gift category, you'll be able to quickly evaluate the progress toward any financial goals you've set for the membership program through the snapshot of data that appears above your results when searching from the Fundraising > Giving page:

Advanced Search

Show gifts where

No saved searches are available

All of the following are true

Gift Date

This fiscal

this fiscal

to

this fiscal

Categories

include any

Gift: Membership

Edit

Add more criteria

Advanced options

Save this search

New Search

Search

View: All giving

Bulk edit

Results 1 - 13 of 13

Gifts 13

Pledged (balance) 0

Installments 0

In Kind 0

\$870

\$0

\$0

\$0

A search on the Fundraising > Giving page for gift records coded to a Membership gift category during the current fiscal year. Gift totals by gift type are captured in the snapshot above the search results.

Membership information can also be included on custom reports built from the Constituents tab or the Fundraising tab. Knowing where to start your report is the key to producing a report with the information that you need. Constituent reports built from the Constituents tab will list constituent records in each row of data, while gift reports built from the Fundraising tab will list gift records in each row of data. These reports often appear similar because you can search for constituent and gift records using many of the same parameters and you can include information about constituent and gift records on both types of reports.

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It can be helpful to think through questions like the ones below to ensure that you create the right type of report:

- Do I want a list of people (members) or do I want a list of gifts?
- How am I going to use the information on this report?
- Am I creating something like a mailing list or a member directory?
- Am I reporting on the financial status of our membership program?

If you are looking to produce a list of people for a mailing list or directory, you will need to start your report by building a search for members in the Constituents tab. If you are analyzing the financial status of the membership program and want to know something like how many membership gifts were made in a certain period of time, you will need to start your report by building a search for membership gifts in the Fundraising tab.

Both types of report will include the option to add the “Memberships” field from the “Constituent Fields” menu in the report builder. By default, this field will export each constituent’s most recent membership information and will include columns for the LGL membership ID, membership level, and membership status. You can customize the field to include additional columns for the start date, end date, and membership note. You can also define which memberships should be exported if you only want to see memberships that fall within a date range or were at a certain level. If you want to see more than one membership record per constituent, you can increase the default count within the Customization Parameters from “1” to a higher number.

Memberships

Customize ·

Label Prefix

Select columns to include

☒ LGL membership ID

LGL membership ID

☒ Membership level

Membership level

☒ Membership status

Membership status

☐ Membership start

Membership start

☐ Membership end

Membership end

☐ Membership note

Membership note

Customization Parameters

Choose the criteria by which membership information will be restricted

Membership dates

All dates

to

Search:

End Dates

and

Latest membership

Membership level

include

Select

Count

1

How many records per row?

OK

The Memberships field can be added to constituent and gift reports

Another option that you can add to both types of report is the “First Membership” field, which will export information about each constituent’s first membership recorded in Little Green Light. This field is helpful to include if you are tracking historic membership data and you want to find out how long your constituents have been members.

First Membership

Customize ·

Select columns to include

☒ LGL membership ID

LGL membership ID

☒ First membership level

First membership level

☒ First membership status

First membership status

☐ First membership start

First membership start

☐ First membership end

First membership end

☐ First membership note

First membership note

OK

By default the “First Membership” field exports the LGL membership ID, first membership level, and first membership status. Additional columns can be added for the first membership start date, end date, and note.

We noted earlier that you can include gift information on constituent reports. If you need to add information about individual membership gifts to a constituent report, you can include the “Gifts” field from the “Gift/Pledge/Goal Fields” menu in the report builder. By default, this field will export each constituent’s most recent gift, but the field can be customized to export gifts based on their coding and the gift date. For example, if an organization is using a gift category to track membership gifts, the Customization Parameters for the “Gifts” field can be updated so that the field only exports gifts coded to the membership category.

Customization Parameters

Choose the criteria by which gift information will be restricted

Gift Types

include

Gift

Edit

Campaigns

include

Select

Funds

include

Select

Appeals

include

Select

Events

include

Select

Gift Categories

include

Membership

Edit

Payment Types

include

Select

Is Pledge Payment?

Yes or No

Date range

All dates

to

Single gift amount

is greater/equal

\$

Count

3

How many records per row?

OK

The Customization Parameters section of the “Gifts” field when building a constituent report. This field has been customized so that only gifts coded to the Membership category are exported. The count has also been increased to three (“3”), which will export up to three gifts per constituent.

Another way to include gift information on a constituent report is by adding the “Total Giving (custom)” field, which is also located in the “Gift/Pledge/Goal Fields” menu.

This field can be used to calculate the total sum of a constituent’s membership gifts and can be helpful if you are looking to find out how many membership gifts each constituent has made.

By default, the “Total Giving (custom)” field will export the sum of each constituent’s gift records from all time. You can customize the field to include an additional “Count” column that lists the number of gifts used to calculate the sum.

Then, as with the “Gifts” field, you can set the Customization Parameters to define which gift types, gift coding, and gift dates are used to calculate the sum. We also recommend completing the “Label Prefix” field to add some context about the customizations you make to the column headers that you will then see on your report.

Total Giving (custom)

Add another · Customize ·

Label Prefix

Membership Giving

Select columns to include

☒ Amount

TG Amount

☐ Deductible

TG Deductible

☒ Count

TG Count

☐ Quantity Total

Qty (In Kind)

☐ Tier

TG Tier

Customization Parameters

Choose the criteria by which gift information will be restricted

Gift Types

include

Gift

Edit

Campaigns

include

Select

Funds

include

Select

Appeals

include

Select

Events

include

Select

Gift Categories

include

Membership

Edit

Payment Types

include

Select

Pledge amount vs. balance

Balance

Is Pledge Payment?

Yes or No

Date range

All dates

to

Single gift amount

is greater/equal

\$

OK

The Customization Parameters section of the “Total Giving (custom)” field when building a constituent report. The field has been customized so that only gifts coded to the Membership category will be used to calculate the total giving amounts. The field also has a label prefix, which will add the phrase “Membership Gifts” to the column headers, and an additional column that will list the count of membership gifts.

# SECTION 4 RESOURCES

[Creating a report](#)

[Reports: Build, customize, and schedule reports](#)

[Generating custom reports from the Constituents or Fundraising tab](#)

[Creating a mailing list to send to a mail house](#)

## Frequently asked questions

### Can I import membership data?

Yes, membership records and membership gifts can be imported using Little Green Light's Flex Importer tool. The [Mapping memberships](#) and [Mapping gift fields](#) help articles provide guidance on the required fields for importing each type of record and the recommended formatting that you can use on your import file.

### Can I create an LGL form that offers automatically renewing memberships?

Yes, by default payment forms created in LGL Forms will have the ability to accept recurring payments enabled, which allows you to offer automatically renewing memberships based on a schedule. However, this option comes with some caveats. Forms that allow recurring payments can only have a single Amount field, so it is not possible to create a recurring membership form with an optional additional Donation Amount field. Recurring membership forms will also make it more challenging to differentiate between new and renewal memberships on gift records because the same gift mapping will be synced to LGL each time a recurring donation is processed. Lastly, at this time, recurring payments set up through LGL Forms can only be edited by someone with access to your LGL account. If someone with a recurring membership wants to change their membership level or schedule, you will need to do so on their behalf by editing the recurring payment.

## **Should recipients of gift memberships be included on renewal reminders?**

This is up to your organization to decide. Keep in mind that renewal reminders are helpful to anyone with an expiring membership whether or not they plan to renew, as your reminder alerts them that their membership benefits are expiring. Recipients of gift memberships can also be a good acquisition source of new donors. If you do not want recipients of gift memberships included on these reminders, you will need to exclude them from your searches.

## **Why can't I see the exact expiration date of membership records?**

Membership start and end dates are truncated to only display the months and year when viewing membership records from the Constituent Details page. Little Green Light does keep track of the full dates that you enter, which you can view by clicking the “Edit membership” option or by exporting membership data in reports.

## **What field should I use to track membership ID numbers?**

Whenever a new constituent record is created, Little Green Light automatically assigns that record a unique Little Green Light (LGL) Constituent ID number, visible in the upper right corner of a constituent's “Name Information” section. You may choose to use this ID as a membership number.

## What field should I use to track membership ID numbers? (con't)

If you prefer to use another type of ID number generated outside of Little Green Light, you can track that in the “External Constituent ID” field. By default, the External Constituent ID field is hidden on constituent records, but it can be displayed in your account upon request. This field will be displayed within the “Name Information” section.

Please note that LGL Constituent IDs are unique identifiers that cannot be assigned to multiple constituents. If you need to assign the same membership ID to multiple constituents, you should consider an alternative option like the “Membership Note” field.

## How should I track the membership if a household has separate constituent records?

We recommend tracking gift and membership records on the primary constituent record representing the household. You can use the Contact Type field to track the primary record, and different contact types such as “Spouse/Partner” or “Household” to track the other record(s). Contact types are a helpful way to control who is included in your mailings or emails. For example, if you only want to send a household a single copy of a renewal reminder, you can include the “Contact Type” parameter in the search used to create your mailing or email list.

If you want to add additional membership records to other household contacts, you will not be prevented from doing so. Keep in mind that this approach will inflate the number of membership records that you have in Little Green Light.

## **How should I track the membership if a household has separate constituent records? (con't)**

This is a good example of why we recommend tracking membership information on gift records, and why reports that tell you the number of membership gifts your organization received can be more helpful than reports that tell you the total number of members you have in Little Green Light.

## **Can membership records be shared automatically with related constituents?**

No. If you would like to track something like a household or family membership across multiple constituent records, you will need to add a separate membership record to each constituent record.

## **Will a constituent with overlapping membership dates impact my search results?**

Yes, this can impact your search results if you are adding additional membership records to your constituent records when memberships are renewed. You may see some overlapping dates if a new membership is started before the previous membership ends. When you use the membership dates parameter in constituent searches, you will need to define whether you are searching for start dates or end dates, and if you want to search within each constituent's first membership, latest membership, or all of their memberships.

## How can I be alerted about submissions to my membership form?

There are a couple of ways you can be alerted about submissions to your form. You can configure an internal notification email in the form's confirmation options to be alerted about every new submission to the form. If you want to review alerts about submissions awaiting review in your LGL Forms Submission Queue, you can add the "Alerts" widget to your LGL Dashboard and click the "Manage alerts" button in the widget to add an alert for LGL Forms.

## Conclusion

Whether you are brand new to managing a membership program or looking for ways to improve your current use of Little Green Light, we hope that this guide has provided some ideas for managing your membership program data.

You can find additional resources on how to use Little Green Light in our Knowledge Base and Video Library. These resources are a great way to learn more about some of the topics covered in this guide, including acknowledgments, mailings, reporting, and LGL Forms.

When you need help troubleshooting an issue, head to the Help page in your account and send a message to our support team. The Help page is also where you can register for a Q&A, our basic training sessions, and any other special training webinars we offer.