



Idea BOOK

FOR HOME OWNER ASSOCIATIONS

Using technology to maximum advantage!

Membership Toolkit is both powerful and flexible. Whether you need to collect dues or fees, manage homeowner contact information, produce a neighborhood directory, communicate, recruit and schedule volunteers, manage finances – or all of the above – you can do it in a way that makes life easier and more organized for all involved. Here are some ideas to get you started.



Contacts & Members Database

Your paperwork
is about to
get easier!

In order to fully use your website, homeowners create user accounts. As they do, their information is **automatically added** to organization's database.

No more endless typing
and deciphering!



Idea

Meet the new neighbor

Your welcoming committee can be notified whenever a new family signs up, and welcome them to the community!

Homeowners type their own info, so your data base has **fewer errors.**

Homeowner

How are you connected to our HOA?
Parent or Guardian

E-mail Address
hannah@membershiptoolkit.com

Title First Name Last Name
Hannah Gleghorn

Address
123 Test Drive

City State Zip Code
Test

Home Phone
(800) 888-1212

HOA Directory

Search: Only Show Favorited ★ Sort by Sort order
No, show all * Homeowner * A → Z *

Age Pet Sitter Babysitter Street

page 1 of 6 showing 1 - 6 of 6

Homeowner	Homeowner 2	Children
Gleghorn, Hannah ☆ hannah@membershiptoolkit.com 1212 Testing St Fresno, TX 76039 ec: (800) 888-1212	Gleghorn, Daniel	Alexander Gleghorn (Middle School) Pet Sitter: Yes Babysitter: No Kirsten Gleghorn (High School) Pet Sitter: Yes Babysitter: Yes
Makuch, Kim ☆ kim.makuch@membershiptoolkit.com 123 Test St. Marietta, GA 30060 ec: (878) 413-9620 ec: (878) 413-9620 ec: (878) 413-9620	Makuch, Dan	Nick Makuch (High School) Pet Sitter: Yes Babysitter: No
Nettleton, Caren ☆ caren@membershiptoolkit.com 1212 Testing St Fresno, TX 76039	Nettleton, Gilbert gilbert@membershiptoolkit.com 1212 Testing St Fresno, TX 76039	Caitlin N (College) Pet Sitter: No Babysitter: No

Collect the info you need —and use it.

Every organization is unique— and needs unique information to function well. **You control which information you collect**, and there is no limit to the number of custom fields you can add to your database. By tagging members with these — and then filtering your database— you can:

1. Email **specific groups**
(ex.—pet sitters, babysitters, etc)
2. **Control who has access to certain forms**
(ex.—only homeowners with lake-front property, etc)
3. Search for **members with special status**
(ex.—board members)

Custom fields

- Neighborhood
- How many years in the HOA
- Pet-sitter
- Babysitter
- Anything else that is important to you!



6 records out of 7 match filters. (Current filter applied: Status = active; = JFS)

Status	Membership Type	Filter by date added	Student Status	Age	board
Active	Non-member	At Any Time	Both Active and Inactive	Under school	No
Outdated	Regular			Middle School	Yes
Inactive	Student			High School	
Cancelled	Lifetime			College	
				Young Adult	

Use command+click to select multiple options.

apply filter

Primary Homeowner	Homeowner 2	Children	Directory	Actions
Beth Frasco 1 main Emerald Park, CT 02803 board: No villa: Villa notes: Created: 9/28/2017 8:31 am	Beth Frasco e: beth.frasco@membershiptoolkit.com p: (1203) 234-3456 w: (1203) 123-4567 m: (1203) 123-4568	Sally Frasco - HS pet_sitting: Yes babysitting: Yes		Toggle directory
Hannah Gleghorn 1012 Young St Frisco, TX 75005	Daniel Gleghorn e: p: w:	Alexander Gleghorn - HS pet_sitting: Yes babysitting: No		Toggle directory

Directory. You've got options.

Whether your organization is tech savvy or “kicks it old school,” you can easily distribute your directory in a variety of ways.



Save money!

If you are trying to save money, email a PDF of your directory, or use one of the online options to distribute.

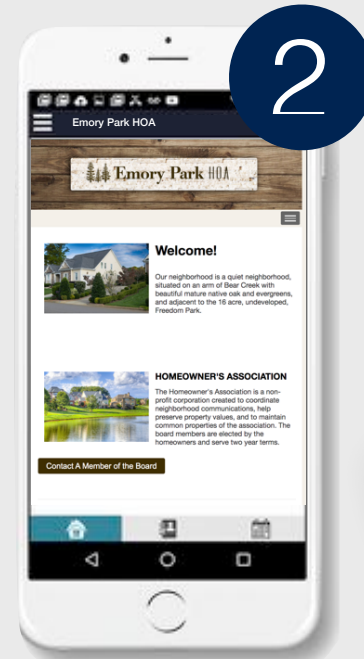
via Web

You control which contacts have access to your directory.

1

via Free App

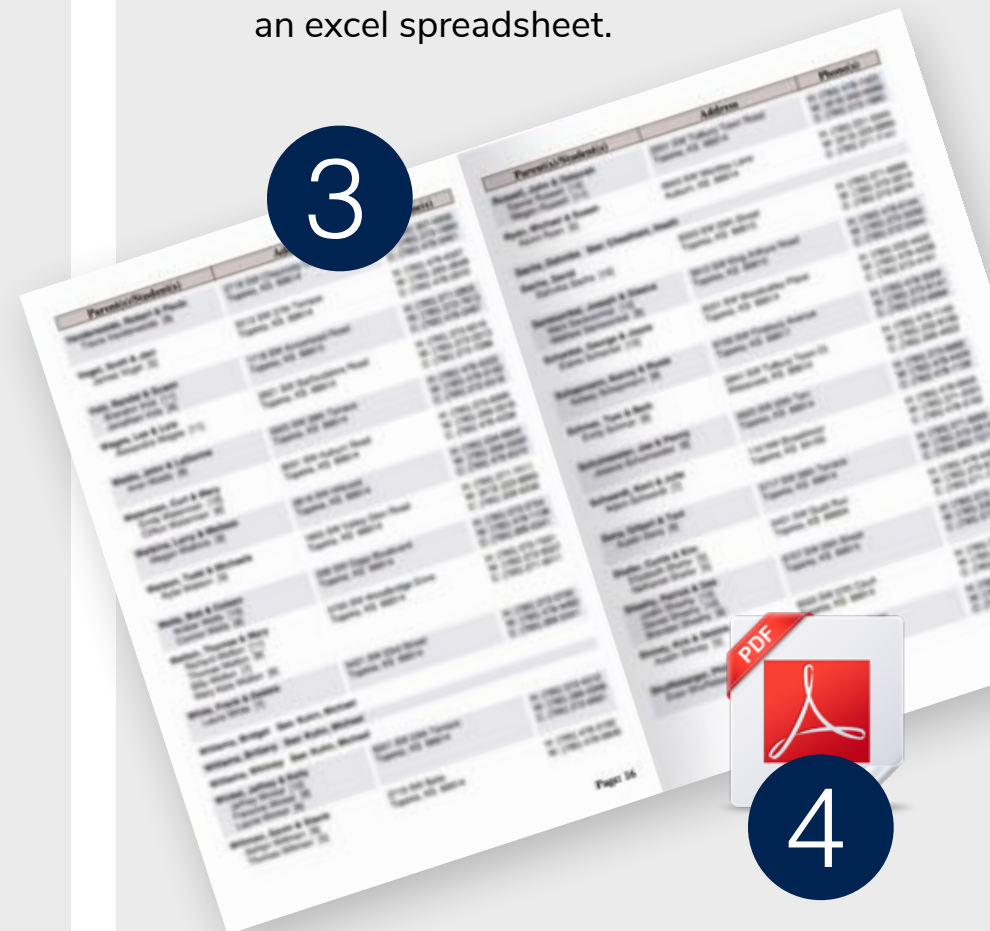
The Membership Toolkit app provides quick access to your directory, calendar and more. And it's free!



via Paper & PDF

Generate a pdf report for a printed directory or download the data into an excel spreadsheet.

3



4

Contacts can update their directory publish settings at anytime.

HOA Directory

Search: Only Show Favored ★ Sort by: Sort order:

Age: Pet Sitter: Babysitter: Street:

Homeowner: Homeowner 2: Children:

Gleghorn, Hannah ☆ 1212 Sebring St Frisco, TX 75035 m: 972-999-1212	Gleghorn, Daniel	Alexander Gleghorn (Middle School) Pet Sitter: Yes Babysitter: No Kirsten Gleghorn (High School) Pet Sitter: Yes Babysitter: Yes
Makuch, Kim ☆ 1212 Sebring St Mammoth, CA 93542 m: 972-999-1212	Makuch, Dan	Nick Makuch (High School) Pet Sitter: Yes Babysitter: No
Nettleton, Caren ☆ 1111 Wonderful Neighborhood Lane Rader, TX 75245 m: 972-999-1212	Nettleton, Gilbert	Caitlin N (College) Pet Sitter: No Babysitter: No Blake N (College) Pet Sitter: No

Website Design & Communication

Easy-to-edit. Custom site designs.

Our websites are easy to edit, and fully customizable—whether you are new to websites, or build them for a living.

No technical experience? No problem. If you can type an email you can update your website!

Know CSS or HTML? Great! Most plans have the tools to further customize your site.

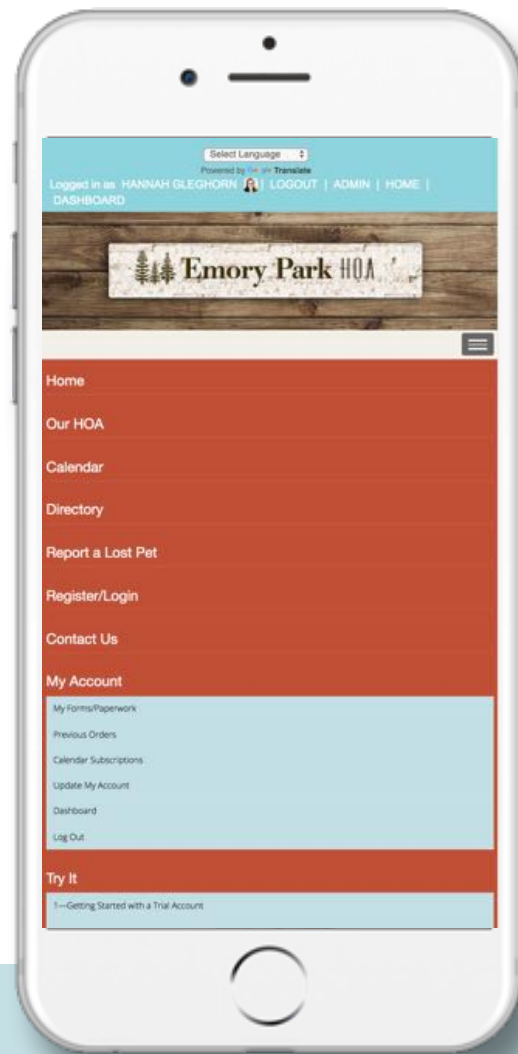


Idea



Let us help with design

Need help creating a custom look and feel? Our Professional Services Team is ready to help and can provide a quote to meet your needs.



Mobile-friendly

Roughly 50% of web users access the web on cell phones or other small devices—so having a mobile friendly website is quite important. Our templates automatically reformat content across all devices so information is easy to read by all, no matter how it is accessed.



Custom domains

If you purchased a domain name (like **www.yourHOAsname.com**), you can use it in place of the default name you are given with your Membership Toolkit account.

Facebook feed

Connect website visitors to the latest news about your organization by adding a Facebook feed to your home page.

** Note that Facebook feeds only present properly if your Group is not private.*

Calendar

sign up for calendar updates

<<	April 2020						>>
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	
29	30	31	1	2	3	4	
5	6	7	7:00p HOA Board M...	8	9	10	4:00p Egg Hunt
12	13	14	15	16			
19	20	21	22	23	24	25	7:30p Adult Casino...
26	27	28	29	30	1	2	

Adult Casino Night
7:30 pm
In the clubhouse - Tickets
Required

Calendars

Keep everyone on the same page with calendar tools. Calendars can be public or private, and can be displayed in 3 different formats—full calendar, list view, or mini cal.

Prefer to use Google Calendar?
We make it easy to host external calendars!



<<	November							>>
S	M	T	W	T	F	S		
30	31	1	2	3	4	5		
6	7	8	9	10	11	12		
13	14	15	16	17	18	19		
20	21	22	23	24	25	26		
27	28	29	30	1	2	3		



Idea

Create multiple calendars

If you create separate calendars for different events (Board Meetings, Annual Meetings, Group Gatherings, etc.), you can display only those dates on any page.

You can then combine those smaller calendars to create a large, complete calendar.

Board Meetings

Thursday, April 16

General Meeting

Thursday, May 21

General Meeting

Thursday, June 18

General Meeting

Thursday, July 16

General Meeting

Thursday, August 20

General Meeting

Reach everyone.

Many organizations struggle with communication due to language barriers. Adding a Google Translate bar solves that problem easily.

More than
80
languages

Idea

Add a Google Translate block to the top of every page, so every parent can read what you write. The side bar is a good place to consider.

Keep in mind that “graphics” with words in them will not be translated.

إجراءات جديدة صباح 8/29

وبحلول نهاية الأسبوع الأول من المدرسة، ليواردز لدينا هي على استعداد للسير إلى الطيقة تستطيع المشي. Benignus بشكل مستقل تحت إشراف أعضاء هيئة التدريس والموظفين أطفالك إلى باب الفصول الدراسية التي تضم على أن تقوم بتسجيل الدخول إلى المكتب الأمامي وتقديم رخصة القيادة الخاصة بك، فإن موظفي المكتب الأمامي تصدر قمت بتحرير الزوار الرسمي. مرة واحدة كنت قد حصلت على تصريح الزائر، يرجى بسرعة المشي طفاك إلى المدرسة ومغادرة المبنى على الفور من قبل 08:15. شكرا لمساعدتنا على حماية أولادنا في Benignus أطفالك في

Arabic
Powered by Google Translate

新しい朝の手順8/29

学校の最初の週の終わりに、私たちのヒョウは、私たちの良性的な教員と職員の監督の下で独立したクラスに歩くことができます。あなたは、フロントオフィスでログインして、あなたの運転免許証を提供することを提供彼らの教室のドアにあなたの子供を歩くことができます。フロントオフィスのスタッフは、あなたの公式訪問者のパスを発行します。あなたが訪問者のパスを取得したら、すぐにクラスにあなたの子供を歩いて、速やか8:15によって建物を残してください。私たちは安全にあなたの子供を保つために協力いただきありがとうございます。良性的な-彼らは私たちの貴重です！

Japanese
Powered by Google Translate

Новые процедуры Утренняя 8/29

к концу первой недели школы, наши Леопарды готовы идти в класс самостоятельно под руководством наших учителей и сотрудников. Вы можете ходить в классные двери при условии, что вы входите в здание, предоставив свои водительские права. Вам будет выдавать вам пропуск. После того, как вы получили пропуск, пожалуйста, быстро ходите в класс и покиньте здание к 8:15. Пожалуйста, держите своих детей в безопасности, покинув здание к 8:15. Спасибо за помощь в сохранении безопасности наших детей в Benignus — они для нас драгоценны!

Procedimientos de la Mañana 8/29

Al final de la primera semana de clases, los leopardos son capaces de caminar a la clase de forma independiente bajo la supervisión de nuestra facultad y personal Benigno. Usted puede proporcionar a sus hijos a la puerta de su salón de clases siempre y cuando realice el registro de la oficina y presentar una licencia de conducir. El personal de recepción le emitirá un pase de un visitante oficial. Una vez que haya obtenido un pase de visitante, por favor caminar rápidamente a su hijo a clase y salir rápidamente del edificio antes de las 8:15 AM. Gracias por ayudarnos a mantener seguros a sus hijos a Benigno—que son preciosos para nosotros!

Spanish
Powered by Google Translate

New Morning Procedures 8/29

By the end of the first week of school, our Leopards are ready to walk to class independently under the supervision of our Benignus faculty and staff. You may walk your children to their classroom door providing that you sign in at the front office and provide your driver's license. The front office staff will issue you an official visitor's pass. Once you've obtained the visitor's pass, please quickly walk your child to class and promptly leave the building by 8:15AM. Thank you for helping us keep your children safe at Benignus—they are precious to us!

English
Powered by Google Translate

新晨程序8/29

按学校的第一周结束时，我们的豹子正准备步行到独立类我们 Benignus教师和工作人员的监督下进行。你可以走你的孩子他们的教室门口为您提供您在前台签名并提供你的驾驶执照。前办公室的工作人员会发给你一个正式来访者的通行证。一旦你获得的访问者的通行证，请赶快走你的孩子上课，由8:15 AM立即离开大楼。感谢您帮助我们在让您的孩子安全Benignus，他们是宝贵的交给我们吧！

Chinese (Simplified)
Powered by Google Translate

Newsletters & Email

Mass-communicate quickly to everyone (or just specific groups) using your integrated database.

Newsletter templates are designed to be simple. **Mobile optimized.**

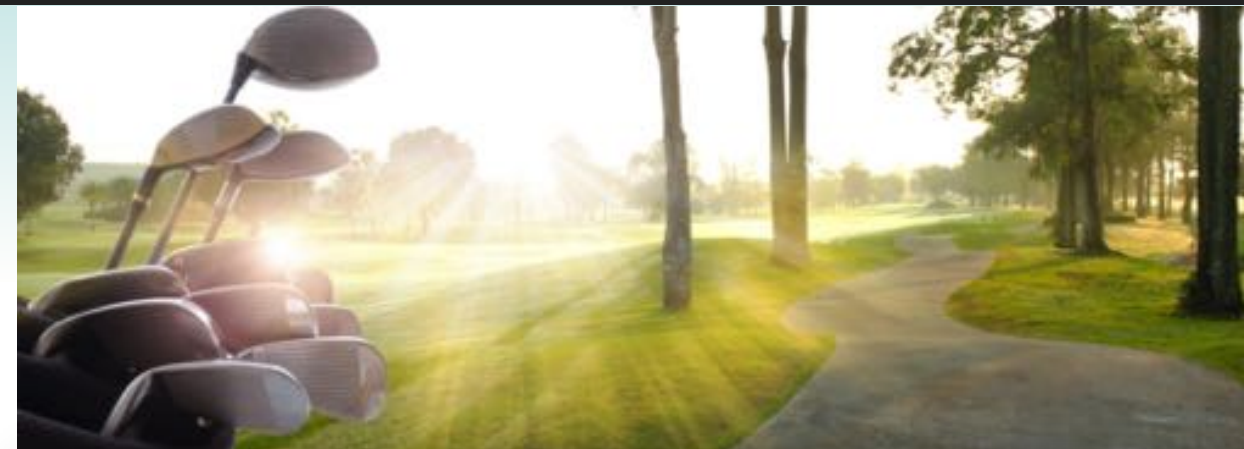


Online Sales & Credit Cards

Collect dues— and save time doing it!

Membership Toolkit gives your organization the power to accept credit cards and offer an online store— which means **all sorts of fundraising options open up**.

When you set up your forms, take advantage of Membership Toolkit's **built in time-saving** receipts and accounting features.



Annual HOA Dues

Association yearly dues help to maintain the common areas in our neighborhood. The Board of Directors is diligent in managing our funds. Dues must be paid by the due date.

Item Description	Price	Qty
Annual Membership Dues	\$250.00	1

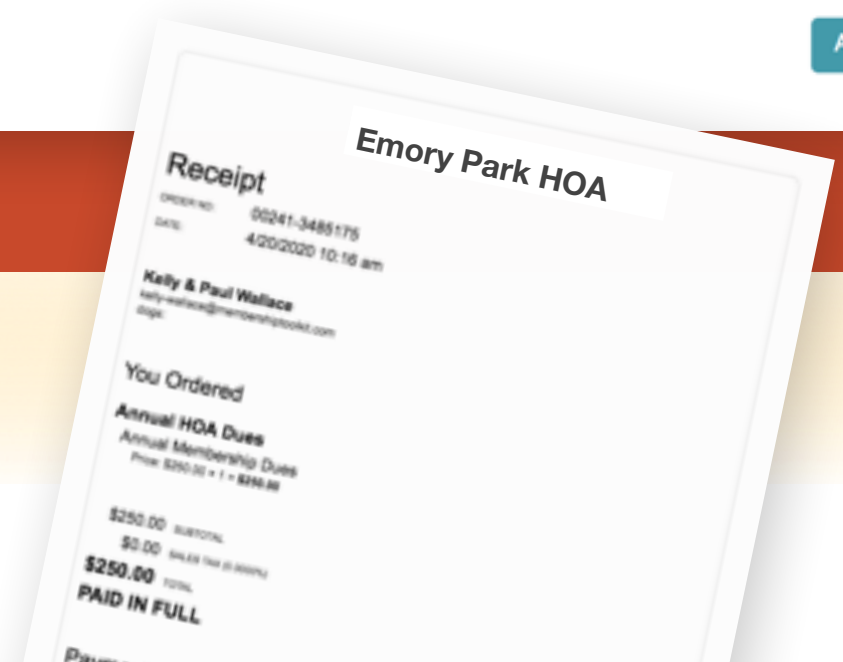
< Back

Add to cart >

Idea

Automate your receipts and “thank yous”

The Membership Toolkit system allows you to automatically send out itemized receipts and “thank you notes.” Take advantage of this feature and save a TON of time.



Idea



Event Sales

For your next event, sell tickets online. If you have a limited number of tickets available for dinner, you can set an inventory control for that item.

Bonus: You can organize volunteers at the same time.



Fall Dinner and Annual Membership Meeting



Join your Neighbors for the Annual Fall Dinner.
Bring your picnic blanket or lawn chairs.

Activities for the Kids

Let them wear their halloween costumes, enjoy crafts and face painting by moms, and enjoy the high school band performance too!

Item Description

The Hamburger Guy

Dinner is \$4 per person and includes: Burgers, Hot Dogs or Chicken Sandwiches.
Sides and a Drink.

Price Qty

\$4.00

[< Back](#)[Add to cart >](#)

Volunteers

Make your community a better place.

A great way to strengthen your community is to provide opportunities to do good. Membership Toolkit makes it easy to nurture relationships, and efficiently schedule volunteers.



Tip



Create a volunteer pool

How would you like a list of volunteers who are ready when you need them? Create a general interest form —then email people who indicate an interest in those particular jobs.

Volunteer Interests

We have many opportunities to volunteer to help with community activities or to be available to help a neighbor. Please consider where you can help. You can update your preferences at any time by logging into your Association account.

Neighbors Helping Neighbors

During times of crisis or tragedy our neighbors can help make the unbearable a little more tolerable. To be prepared we have a list of volunteers who would like to be contacted if a need arises.

Donate A Meal

Prepare and bring a meal for a family during difficult times such as a death in the family, illness, accident, or other hardships.

[sign up / edit](#)

Moms In Touch

Join a group of neighborhood moms who meet once a month to pray for the families in our neighborhood, our schools, and community.

[sign up / edit](#)

Volunteer to Drive

Help a neighbor get to the store or doctor's appointment if they are unable to drive.

[sign up / edit](#)

[Cancel](#)

[Save](#)

Contact volunteers

Once you have a pool of volunteers, you can contact them easily with a few clicks.

Neighbors Helping Neighbors

During times of crisis or tragedy our neighbors can help make the unbearable a little more tolerable. To be prepared we have a list of volunteers who would like to be contacted if a need arises.

		Assigned	Max
Donate A Meal	Prepare and bring a meal for a family during difficult times such as a death in the family, illness, accident, or other hardships.	10	
Moms In Touch	Join a group of neighborhood moms who meet once a month to pray for the families in our neighborhood, our schools, and community.	5	-
Volunteer to Drive	Help a neighbor get to the store or doctor's appointment if they are unable to drive.	12	-

Opportunities: **Donate A Meal** [10 interested]

Donate A Meal

[back to form](#) [download as excel](#) [email](#)

	First Name	Last Name	Bkgnd	Email Address	Home Phone	Work Phone
view	Theresa	Reese		theresareese@gmail.com		
view	Wendy	Reese		wendyreese@yahoo.com		
view	Wendy	Reese		wendyreese@gmail.com		
view	Carol	Reese		carolreese11@gmail.com		
view	Andrea	Reese		andreareese@gmail.com	(908) 777-2888	(908) 777-2888
view	Wendy	Reese		wendyreese@gmail.com	(214) 888-8888	(214) 888-8888
view	Wendy	Reese		wendyreese@gmail.com		
view	Emily	Reese		emilyreese@yahoo.com		
view	Charles	Reese		charlesreese@gmail.com	(214) 457-4444	
view	Charles	Reese		charlesreese@gmail.com		

Collect RSVPs

Need to know how many people will attend a group event? Send out and RSVP!

Ladies Wine Night - August 8 - RSVP

1204 Riverview Dr.
Jennifer Craft's Home
Bring your favorite beverage. The Social Committee will be providing snacks.



Will you be attending Ladies Wine Night on August 8? (reset)

☐ Yes

Name

Comments

[< Back](#)

- ☐ I'm not finished with this form yet, but want to save it
- ☐ I'm finished with this form and I am ready to submit it

[Save and Continue >](#)

Schedule volunteers

For specific events, set up a form and allow volunteers to select a day and time and job that works for them. You can manually add volunteers also, if needed.

Limit the number of volunteers, control whether the names of signed up individuals are shown or hidden.



Casino Night

Love Casino Night? We could really use your help! Consider helping us make sure the event is a success.



Set Up

1 out of 5 filled.
Signed Up: Hannah Gleghorn

[sign up / edit](#)

Dealers

Some experience is necessary

Black Jack Dealer

0 out of 2 filled.

[sign up / edit](#)

Craps Dealer

1 out of 2 filled.
Signed Up: Daniel Gleghorn

[sign up / edit](#)

Craps Dealer

0 out of 2 filled.

[sign up / edit](#)

Black Jack Dealer

0 out of 2 filled.

[sign up / edit](#)

Tear Down

1 out of 4 filled.
Signed Up: Daniel Gleghorn

[sign up / edit](#)

Homeowner
☐ Hannah
☒ Daniel

[Cancel](#)

[Save](#)

Edit Volunteer Form - "Casino Night"

Overview Presentation Opportunities Confirmation Email **Tickler Emails** Form Conditions Changes

What is a Tickler Email? Ticklers are email templates that you can schedule to send out before or after a volunteer opportunity to remind, deliver information, or thank your volunteers for helping out.

[+ add scheduled email](#)

Status	Scheduled	From	Subject
active	4 days before at 6:00 pm	Caren Nettleton <caren@membershiptoolkit.com>	Casino Night — Quick Reminder!
active	1 day before at 6:00 pm	Beth Frasco <beth.frasco@membershiptoolkit.com>	Casino Night — Last minute instructions
active	1 day after at 6:00 pm	Beth Frasco <beth.frasco@membershiptoolkit.com>	Thank you for volunteering!

[save and continue >](#)

[save and close](#)

[cancel](#)

Auto-remind & thank

Once a volunteer signs up, you can send them auto reminders, and a thank you — so that your events run smoothly and everyone is recognized for their service.

Thank you for volunteering!

Watch for emails with more information closer to the event. If you have not already done so this year, please be sure to request a [Background check](#). I look forward to serving with you! Let me know if you have questions

Andre Booster
booster@membershiptoolkit.com



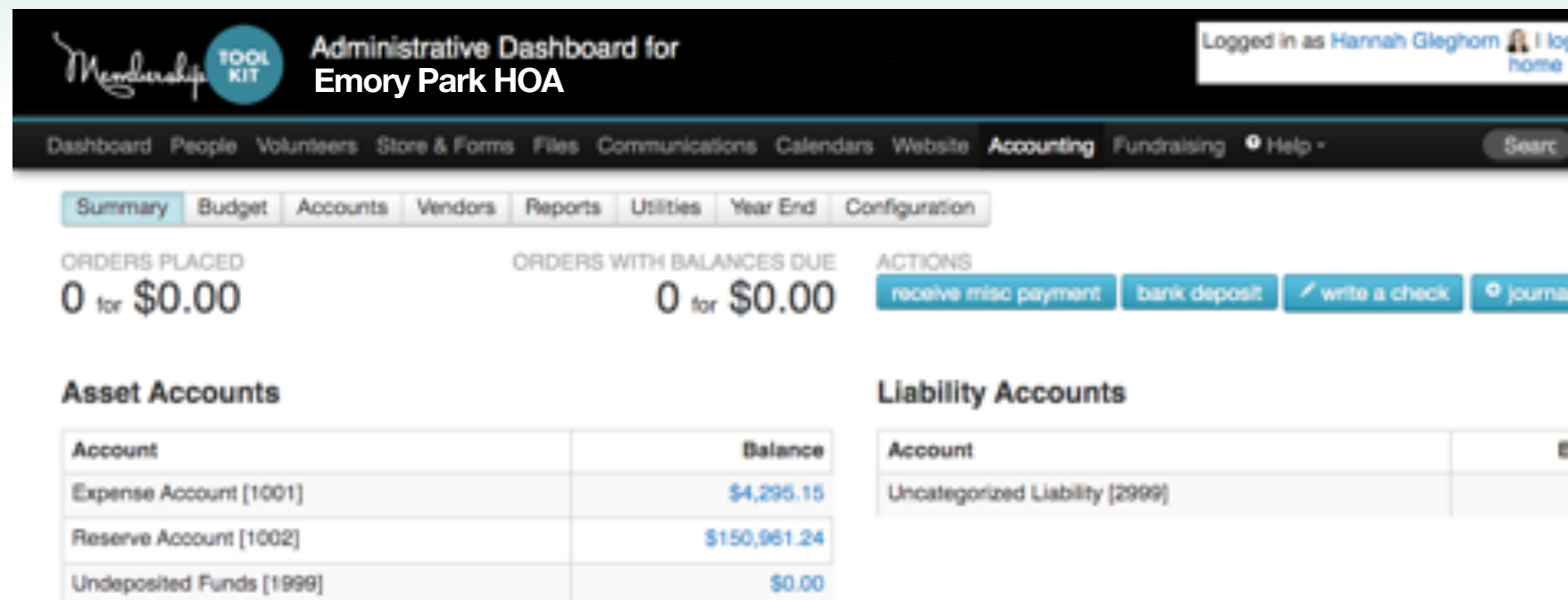
Emory Park HOA



Financial Tools

Bookkeeping made easier.

Membership Toolkit financial tools are web based so there is no software to download.



Membership Toolkit Administrative Dashboard for Emory Park HOA

Logged in as Hannah Gleghorn | Log out

Dashboard People Volunteers Store & Forms Files Communications Calendars Website **Accounting** Fundraising Help

Summary Budget Accounts Vendors Reports Utilities Year End Configuration

ORDERS PLACED: 0 for \$0.00

ORDERS WITH BALANCES DUE: 0 for \$0.00

ACTIONS: receive misc payment bank deposit write a check journal

Asset Accounts

Account	Balance
Expense Account [1001]	\$4,295.15
Reserve Account [1002]	\$150,961.24
Undeposited Funds [1999]	\$0.00

Liability Accounts

Account	Balance
Uncategorized Liability [2999]	

Track your assets & budgets

Create a customized Chart of Accounts to track all of your Assets, Liabilities, Income, and Expense Accounts.

Reports

Run reports at a click of a button.

Financial transparency

The risk of financial theft is real. Allow board members to see an overview of your organization's income and expenses to reduce this risk.

Administrative Dashboard for
Emory Park HOA

Menu

Summary Budget Accounts Reports Utilities Year End Configuration

add account + rearrange save as template... create a manual entry enter an opening balance

From 1/1/2020 to 12/31/2020 refresh

Account	Account Name	Budget	Actuals	Remaining Budget	% of Budget
Income					
4001	Balance Forward - Operating Budget	\$3,859.68	\$0.00	\$3,859.68	0.00%
4030	Donations	\$0.00	\$0.00	\$0.00	
4040	Gate Remotes	\$0.00	\$0.00	\$0.00	
4100	Interest Income	\$0.00	\$6.41	(\$6.41)	
4200	Dues	\$48,723.00	\$48,723.00	\$0.00	100.00%
4201	Dues - Late Fees	\$0.00	\$0.00	\$0.00	
4400	Title Transfer Fees - Resale Certificates	\$600.00	\$300.00	\$300.00	50.00%
4700	Balance Forward - Reserve Fund	\$101,015.06	\$0.00	\$101,015.06	0.00%
4710	Reserve Dues	\$9,477.00	\$9,477.00	\$0.00	100.00%
4999	Uncategorized Income	\$0.00	\$0.00	\$0.00	
Income TOTAL		\$163,674.72	\$58,506.41	\$105,168.31	35.75%
Expenses					
5001	Operating Carryover to 2020				
5002	Reserve Fund Carry Over to 2020				
5080	Electricity				
5081	Electricity - Cotswold Meter	\$			
5082	Electricity - Lyndhurst Meter	\$1,5			
5083	Electricity - Glenmont Meter	\$2			
5084	Electricity - Villa Lamps Post	\$4			
5120	Insurance	\$3,2			
5400	Landscaping				
5401	Landscaping - Monthly Maintenance	\$21,0			
5402	Landscaping - Misc Expenses	\$2,5			
5403	Sprinkler System	\$3,0			
5404	Chemical Weed Control	\$1,7			
5500	Miscellaneous / Contingency	\$1,5			
5600	Professional Fees	\$1,0			
5800	Villa Gate Expenses				
5801	Telephone & Internet Expenses	\$5			
5802	Villa Gate - Repairs	\$5			
5850	Water				
5851	Water - Lyndhurst Meter	\$6,5			
5852	Water - Cotswold Meter	\$4,5			
5700	Reserve Expenditures	\$0.00	\$0.00	\$0.00	
5710	Common Area / Landscape Improvements	\$3,500.00	\$2,400.00	\$1,100.00	68.57%
5720	Creek Improvements	\$8,500.00	\$0.00	\$8,500.00	0.00%
5730	Villa Sidewalks and Street Improvements	\$1,000.00	\$0.00	\$1,000.00	0.00%
5740	Villa Columns	\$1,600.00	\$0.00	\$1,600.00	0.00%
5750	Villa Gate	\$0.00	\$0.00	\$0.00	

Administrative Dashboard for
Emory Park HOA

Menu

Summary Budget Accounts Reports Utilities Year End

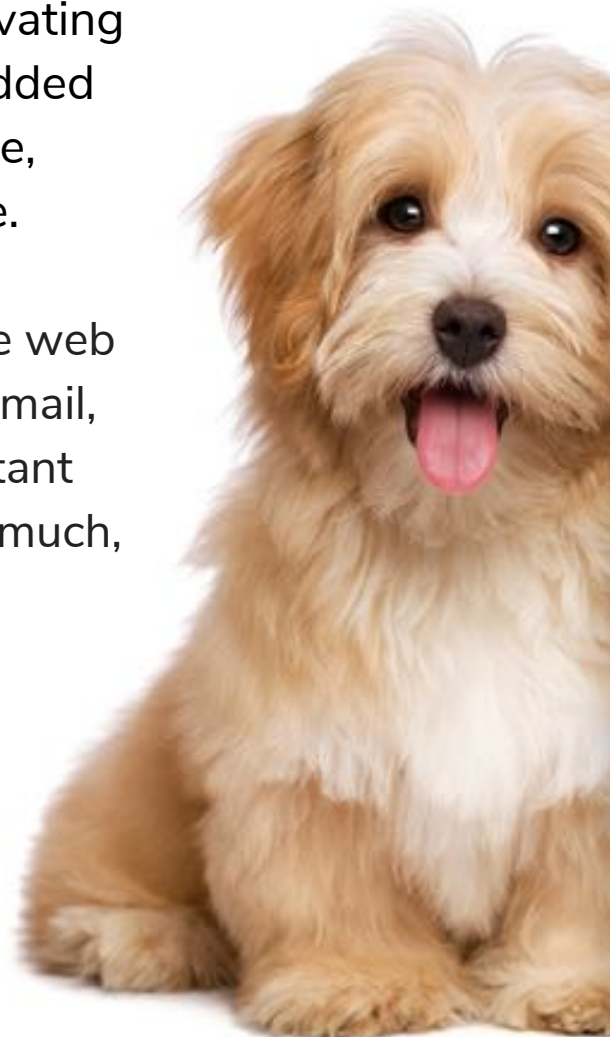
- Budget Report**
Produce an on-screen summary of your budget.
- Budget vs. Actuals Report**
Produce an on-screen summary of your budget and income/expenses to
- Income & Expense Report**
Produce an on-screen report of your income & expenses for a given date
- Balance Sheet Report (Statement of Financial Position)**
Produce an on-screen report of your assets & liabilities for a given date
- Transaction Report**
Produce an on-screen list of all payments and transactions, useful for rec
- Order Financial Matrix**
Produces an Excel spreadsheet of all orders with the dollar amounts bro
- Catalog Account Usage**
Produce an on-screen report of your catalog and all accounts that your p
- Previous Reconciliation Reports**
View or download a previous reconciliation report.
- Prior Year Reports**
Download saved PDF reports from prior year closeouts.
- Financial Log Report**
Produce an on-screen report of log entries.

Fun Extras

Comments

Make your website a communication hub by activating comments! These can be added to any page on your website, and can be public or private.

Comments appearing on the web page are also delivered by email, so you never miss an important comment. If it becomes too much, just turn comments off.



Create a pet-finder page

Create a neighborhood pet-finder tool by creating a page, and turning on "comments."

Lost Pet

HOA Members are welcome to use this section when a pet has been lost or found and you want to broadcast a message to all HOA Members. Please limit comments and replies to lost pet details only.

Note: To post on this page you must be a current year HOA Member. If you need to pay your dues, [click here](#).

Comments



Has anyone seen our dog Sherlock? He's an Irish Terrier. His collar has a grey and black bow tie on it. He is chipped.

save comment

Want to give it a try?



Haven't tried Membership Toolkit software yet? We invite you to try the software for free. No pressure. Play with it for a while and see if it makes sense for your organization.



Your free demo awaits!

Sometimes the easiest way to know if something works is to watch it in action.

Start the process

