



Lighthouse Geek Sheet 1: Membership Information

Lighthouse contains a huge wealth of information on a person's membership status and if you're helping to contact members, understanding it will make a huge difference.

With a good understanding of the membership information presented in Lighthouse, you'll be able to help make sure that your members renew on time each year and correctly advise about eligibility for membership rights - like voting in selections.

Membership Information

A person's membership information can be seen in two locations, in a summary format on a list view and in more detail on a contact record

List View

Membership	Branch	Member N ^o	Since	Until
✓ Active Member North Edinburgh, East & Leith		10180363416 ⚠ 8542716	11 Nov 2009	6 Apr 2023

Above is an example of the summary information visible on a list view - we'll explain later on in the Geek Sheet what these fields mean.

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Contact record

Membership

- ✓ Member status: Active Member
 - First joined: 11 Nov 2009
 - Member since: 11 Nov 2009
 - Renewal date: 6 Jan 2023
 - Lapse date: 6 Apr 2023
 - Local party: North Edinburgh, East & Leith
- 📄 Membership number: 10180363416
- ⚠️ 8542716
 - Membership amount: £36.00 a year by Direct Debit
 - Payment status: Active
 - Recruited by PRO (Not eligible)
- 📧 Ballots by: Email

On a full contact record you then get a much more detailed view of someone's information. Again, we'll explain all of the fields in this section later on in the document.

Member status

Within Lighthouse, you'll see a pair of fields combined together and presented as "Member Status". On the example we saw earlier, it said "Active Member", with each item being clickable (clicking on either active or member creates and runs a filter for other members with that status - which is handy to know!).

✓ Member status: Active Member

The two fields are membership status - here, the "Active" value and membership type - here the "Member value"

Combined, these tell you what kind of member someone is and whether or not their membership is current.

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Membership Status

Membership status is a field that tells you if someone's membership is current or not. There are a number of possible values for this field, which are listed below.

Status	What it means	Applies to members	Applies to supporters
Active	This person's membership is current	✓	✓
At Risk	This person has not renewed their membership for the current year, but is still within their grace period.	✓	✗
Lapsed	This person historically chose not to renew their membership.	✓	✗
Ended	This person's supportership was ended automatically after they opted out of communications	✗	✓
Resigned	This person actively cancelled their membership	✓	✓
Expelled	This person's membership was ended as a result of the disciplinary procedure	✓	✓
Suspended	This person's membership is currently not active, but it may be reactivated or ended in future - this is used only as part of the disciplinary process.	✓	✓
Pending	This person has started to join the party, but not completed the process.	✓	✗

Membership Type

Membership type is the partner to status and shows you what "Type" of member someone is - a Member, Registered Supporter or a non-member.

This doesn't tell you the current status of that membership and must be used in combination with Status to get the full picture.

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Type	What it means
Member	This person is, or was a paid up member of the party.
Supporter	This person is or was a registered supporter of the party.
Non-Member	This person has never been a member or supporter of the party.
Parent	This person is the parental contact of a member or supporter under the age of 13.

Payment Types

This field tells you how someone currently, or historically paid for their membership. This also gives you some indication of how much at risk of lapsing they may be.

Members on recurring payment types - like Direct Debit are the members least likely to lapse, whereas members who pay via a one-off method, like cash/cheque or one-off card are the most likely to lapse.

Registered supporters do not pay for membership, so they have no values in these fields.

Type	What it means
Direct Debit	These people pay by Direct Debit. Their membership will be renewed automatically unless they cancel or their direct debit fails (which is extremely rare).
Recurring Card Payment	These people pay by card payment, which is taken automatically every year unless they cancel it, or the card fails. These people will usually need to manually renew every 3-5 years.
One-off card payment	This person pays via a one-off card payment each year. These members have to renew their membership every year and so are most likely to lapse.
Cash & cheque	This person pays via a cash or cheque payment each year. These members have to renew their membership every year, but tend to be older members who have been members for a longer period - making them more likely to renew than one-off card members. Cheques & cash must be received by HQ to be processed and cannot be processed locally.

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Payment Statuses

This field tells you if someone is currently paying for their membership. Especially for members on a recurring payment type, this will likely give you a very good idea of members who are likely to go at risk.

Registered supporters do not pay for membership, so they have no values in these fields.

Type	What it means	Applies to Direct Debit	Applies to Card	Applies to Cash
Active	Their payment method is currently active and their membership is up to date	✓	✓	✓
Pending	Their payment method has been set up yet, but has not yet been collected. They should be treated as full members during this period.	✓	✗	✗
Failed	The last collection attempt has failed and their membership is therefore not up to date.	✓	✓	✗
Not Recieved	They pay via a one-off method, which was not received by their renewal date.	✗	✓*	✓
Cancelled	They have cancelled this payment method, but not yet ended their membership for the party.	✓	✓**	✗
TBD	Their payment is currently being processed and we are awaiting a response from their bank.	✓	✗	✗

* One-off card payments only

** Recurring card payments only

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Dates

In addition to the types and statuses, Lighthouse also contains a number of date fields, that can help you to analyse where in the life cycle a member or supporter is.

These date fields will control when other events - like an active member going at risk or an at risk member lapsing happen, so it's important to understand how they interact.

Date	What it means	Applies to Members	Applies to Supporters
First joined	This is the date on which a member first joined the party. They may have left and rejoined since this date.	✓	✓
Member since	This is the date that their current continuous membership started on.	✓	✓
Renewal date	This is the date that their next annual membership payment is due by. After this date, if it's not received, they'll enter their grace period	✓	✗
Lapse date	This is the date that their grace period ends on. Their status will change to lapsed the next day if payment is not received in time.	✓	✗
End date	If they have left the party, this is the date that their last membership ended on. Where folk have left and rejoined, this will remain - so should always be checked with other dates / statuses.	✓	✓

Other fields

In the Membership section there are a small number of additional fields visible that give you extra context on someone's membership.

These include:

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Field	What it means	Applies to Members	Applies to Supporters
Local Party	Which local party a member is part of	✓	✓
Branch	Which branch (or which branches) someone is assigned to	✓	✓
Membership Number	What their current membership number is	✓	✓
Legacy Number	Some members have changed membership number during their time with the party and may have a "legacy number" - this may also be the one that they remember. Both should be treated as valid for internal processes, but a legacy number can't be used to renew a membership.	✓	✗
Membership amount	How much they pay for their membership each year.	✓	✗
Recruited by:	Shows if this person was recruited locally or not and if they were, what bonus they're currently giving you	✓	✗
Ballots by:	How this person should get election ballots - users can change this preference themselves.	✓	✗

Bringing it all together

Combining that information, you get a very rich set of information on a person's membership.

Taking a look back at the example we saw earlier, we can now tell that:

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Membership

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This member is an Active Member, who is actively paying by Direct Debit. They pay £36 a year for their membership and have been a member continuously since the 11th November 2009.

Their next renewal date is on the 6th January 2023 and if they don't renew by that date, their grace period will run to the 6th April 2023, at which point they will lapse.

This person is a member of the North Edinburgh, East and Leith local party and they have both a membership number and a legacy number. They are not eligible for the local recruitment bonus and they get their ballots in internal elections by email.

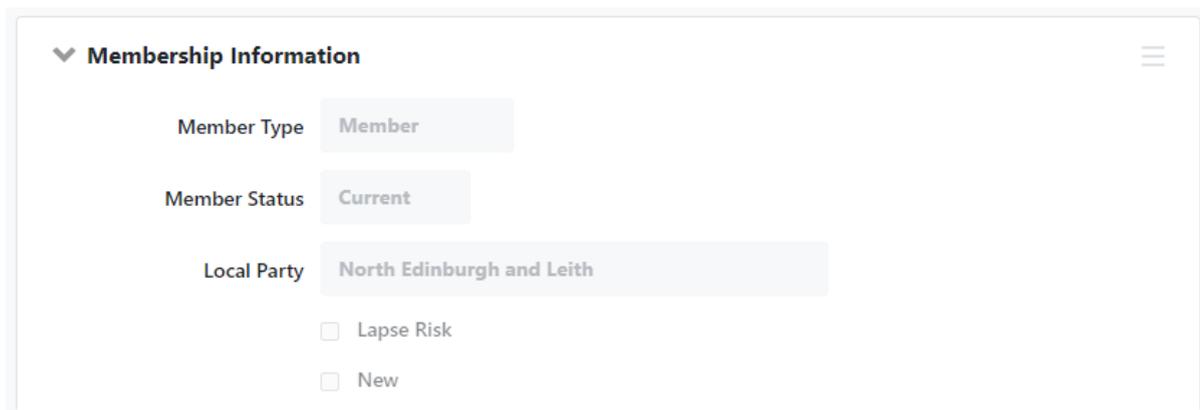
Next steps:

Take a look through a few records on your version of Lighthouse and compare their information to what's listed in this Geek Sheet to see if you can understand it - hopefully it all makes sense now!

Connect

Connect also contains some of the information Lighthouse does on membership. The full details of someone's membership can only be found on Lighthouse, but Connect has enough information to allow you to canvass, call or otherwise contact members via Connect.

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The screenshot shows a form titled "Membership Information" with a dropdown arrow on the left and a menu icon on the right. The form contains the following fields and options:

- Member Type:** Member
- Member Status:** Current
- Local Party:** North Edinburgh and Leith
- Lapse Risk
- New

Currently, on Connect you can see what Type of member someone is, what their status is and their local party.

You also have two checkboxes. Lapse risk indicates a member in their grace period and New indicates a member who joined in the last 30 days.

If Connect and Lighthouse ever disagree on information, then the version on Lighthouse is correct.

What to do if you think something is incorrect

If you think something is wrong with someone's membership status display on Lighthouse, the first thing that you should do is submit a problem report explaining the issue.

The team will be very happy to take a look.

[You can find out more on Problem Reports here.](#)