

Background

See <https://www.drupal.org/project/member>

Functional Roadmap

This proposal for an initial roadmap is based on the needs of real organizations that would use Member Platform.

The term “milestone” is used generically to sequence the work, but could correspond to minor releases.

The initial milestones prioritize features to attract adoption by:

- Drupal local associations / user groups; then
- Other identified organizations likely to adopt Member Platform

Minimum Viable Product

Version 1.0

A functional specification for these features is being drafted. See [\[#3515926\]](#)

Item	Subitem
Feature: Contact Management	• Add/edit/delete contacts • List contacts • Export all contact data • Import contacts from CSV
Feature: Member Management	• Single membership type: Member (i.e. lifetime member) • Add/edit/delete membership for contact • Filter contacts by membership status
Feature: Member Experience	• Join / become a member (need to confirm email) • End membership • Log in • Customize member profile • Browse member directory • View other members' profiles Not in scope: • Membership dues/payments

Feature: Event Management	• Add/edit/delete events • Calendar (and list) of past and future events • List members by RSVP status • Set RSVP status for a member • Announce event to members Not in scope: • Paid events
Feature: Event Attendee Experience	• RSVP “Yes” or “No” to an event • Edit RSVP for an event • Member can RSVP when logged in • Anyone can RSVP with an email address by clicking link in resulting email (non-member becomes member) • Ability to RSVP guests
Feature: Send out emails	• Send outbound emails ◦ To entire user base (active, inactive) ◦ By role ◦ By RSVP status for an event • Require the platform to use an email service provider (e.g. Amazon SES, Sendgrid, Mailchimp Transactional) to ensure delivery of emails Not in scope: • Integration with Mailchimp or any specific provider
Access Control	• Customizable roles, each with permissions
i18n	• Localization of user interface into at least one non-English language
Theme	• Ensure a good experience using Olivero (public/member-facing) + Gin (admin-facing) • Possibly provide a custom theme for limited use cases e.g. homepage • Assume that org might use a custom or contrib theme
Architecture to Support Future Needs	Forethought for: • Membership types • Multiple memberships per contact • Multiple contacts per membership • Household memberships • Organizational memberships • Dues payments • Groups that want to also leverage Event Platform
Infrastructure	• Create a recipe that installs other recipes • CI/CD with automated testing
Groups Expressing Interest	• See [#3514527]

Upgrade process for recipe-based sites:

- More recipes that alter existing sites
- Upgrade effort is by the site owner applying the upgrade recipes
- Can be applied to existing sites

Upgrade process for distribution-based sites:

- Release a new version of the distro; customers upgrade their local site
- OpenSocial uses a distribution
- Must start from scratch
- Upgrade effort is by the distribution maintainer (but not always smooth/easy for site owners)
- Best when modules have inter-dependencies i.e. the member profile can send information to email sending module

Is there a middle ground?

- Start with an initial install recipe
- Individual modules can be updated thereby providing new features
- Later versions of the complete install will have new component recipes—perhaps those recipes can be reapplied to gain new features?

Feature Ideas

Please add feature ideas to [Feature brainstorming](#) so we can incorporate them into the roadmap when appropriate.

Milestones (out of date)

Milestone 1 (Member Tracking)

Use Cases Served

- A hypothetical membership organization (MO) that currently tracks its past, present, and prospective members on paper or in a spreadsheet and would benefit from a more structured system with the promise of additional features in future releases

Goals

- Get our feet wet as a team
- Provide something installable so others can see the direction we're headed and so we can attract more contributors

- Provide a structured way for an MO to track their contacts, contacts' memberships with the MO, and other relationships among contacts
- Provide a way for MO to export all contact data
- Provide a way for MO to assign roles to its staff/volunteers to view/manage contact information and memberships
- Demonstrate utility of to-be-chosen Drupal-native CRM project, including ability to support many types of memberships to suit many different MO's needs
- Establish methods of contributing directly to that CRM project
- Build out build tools/pipeline inc. automated testing
- Explore approaches to providing a delightful user experience (UX)
- Begin localization into a non-English language to demonstrate global applicability
- Identify gaps in usability, accessibility, and internationalization and prioritize resulting tasks for this release or specific future releases
-

Milestone 2 (Mailchimp Sync)

Use Cases Served

- Austin Drupal Users Group (see [full requirements](#)) does not have an email list (or even a list of email addresses) and seeks to create one in Mailchimp so it can send emails directly to members. All memberships are free and have no end date. The group is willing to adopt (install) Member Platform to collect names and email addresses from its members, manage its member list, and sync its member list with a Mailchimp Audience and is interested in expanding its use of Member Platform as its feature set evolves.
- DrupalNYC
- A hypothetical MO uses Mailchimp and wants to adopt Member Platform to track its contacts and manage its members.

Goals

- Provide MO a way to connect Member Platform to a Mailchimp Audience
- Provide MO a way to sync contacts and their membership status / tags (one-way) to Mailchimp
- Provide MO a form to use to collect new members with the option to subscribe to the MO's email list
- Provide MO a way to import contacts (inc. using an export from Mailchimp)

Milestone 3 (Event Registration)

Use Cases Served

- Austin Drupal Users Group currently collects RSVPs for [its events on Meetup.com](#). With an eye toward eventually moving off of the increasingly expensive private equity wrecked

platform that keeps getting worse for organizers and attendees, the group wishes to start collecting RSVPs where it owns the data (names and email addresses) of the attendees so it can communicate with them about the event for which they registered as well as about future events.

- DrupalNYC currently collects RSVPs for its events using [Tito](#) so that it has access to the attendee data (esp. emails) that Meetup doesn't provide without an expensive "Pro" subscription. DrupalNYC manually adds attendee names and emails from Tito to its Mailchimp audience, which it uses to communicate with its contacts. DrupalNYC has an existing Drupal 10 site where it already publishes event information that duplicates the information on drupal.org Community Events. DrupalNYC is interested in simplifying its setup by collecting RSVPs on its website rather than in Tito and is willing to adopt Member Platform into its existing website to do this and benefit from syncing event details from drupal.org Community Events and attendee information to Mailchimp.
- ZNA
- Blackfly Sustainable Living Co-Op needs:
 - A calendar of events for meetings, workdays, important dates, and social gatherings.
 - The ability to create, edit, and manage events.
 - Members should be able to RSVP, receive reminders, and access event details.
 - Notifications for event changes or cancellations.
- A hypothetical MO uses Meetup.com to offer free events and wants to stop paying for its Meetup.com subscription. It wants a platform where it can collect members, post events, collect RSVPs, and communicate with its members.

Goals

- Provide MO a way to create and update an event that supports collection of RSVPs including name, drupal.org username, and email address
- Provide MO a way to open/close registration for an event
- Provide MO a way to set a maximum number of RSVPs for an event
- Provide prospective attendees with a way to RSVP for an event, which can make them a member and include an option to subscribe the MO's email list and an option to make their RSVP visible to the public
- Provide member who has RSVP'd with a way to modify their RSVP (e.g. state that they are not attending)
- Provide MO a way to modify a member's RSVP for an event
- Provide MO a way to set up syncing RSVP status for an event to Mailchimp to facilitate communications to attendees / non-attendees
- Provide MO with a way to sync information for an event from drupal.org Community Events by providing the event's URL (e.g. <https://www.drupal.org/community/events/austin-drupal-meetup-march-2025-2025-03-11> to avoid entering data in multiple places
- Provide MO a way to publish a calendar of events
- Explore whether elements of [Event Platform](#) can be leveraged

- Promote Member Platform as an option for meetup groups willing to use Mailchimp (or an unintegrated) service for communications
-

END OF MVP 1.0

Milestone 4 (Internal Outbound Email)

Use Cases Served

- Austin Drupal Users Group, now using Member Platform synced with Mailchimp, wants to stop paying for Mailchimp and needs a way to communicate with its members directly from Member Platform, including a way to schedule reminder emails before events.
- DrupalNYC, now using Member Platform synced with Mailchimp, wants to stop paying for Mailchimp and needs a way to communicate with its members directly from Member Platform, including a way to schedule reminder emails before events.
- ZNA
- Blackfly Sustainable Living Co-Op
- A hypothetical MO that doesn't use Mailchimp wants to adopt Member Platform to manage and communicate with its members

Goals

- Provide MO a way to send a rich text email through the platform to contacts with option to segment based on membership and whether a contact RSVP'd for a given event
- Provide MO a way to schedule a rich text email as described above based on the segment at the time an email is sent
-

Milestone 5 (Dues and Payments)

Use Cases Served

- Zilker Neighborhood Association (ZNA) is about to launch a Drupal 10 website. ZNA uses Zeffy to collect membership dues and other payments, Xero for financial accounting (and as a poor CRM), and Mailchimp to communicate with its contacts. ZNA uses Zapier to move dues/donations/event sales data (esp. contact information) from Zeffy to Xero and Mailchimp. Zeffy doesn't provide the best user experience and Zapier is fairly expensive. ZNA needs a basic solution for event registration inc. paid tickets. ZNA needs to accept membership dues payments for individuals inc. cases where one individual is paying for a second individual's membership at the same address and get that information to Xero and Mailchimp. ZNA wishes to adopt Member Platform on its

Drupal 10 website to replace Zeffy and reduce its use of Zapier (and is willing to integrate Drupal with Zapier to get the data to Xero).

- Blackfly Sustainable Living Co-Op needs
 - A clear and accessible process for members to pay dues.
 - Support for multiple payment methods, including online payments, in-person payments, invoicing, and automatic renewals.
 - A way to track and record payments for transparency and financial oversight.
 - Notifications or reminders for upcoming or overdue payments

Goals

- Self-service dues payments for new and existing (e.g. renewing) members
- Support payment cards (credit/debit), possibly via a third-party payment platform such as PayPal, and offline payments (e.g. cash/check)
- Support automatic renewals
- Support one individual paying for multiple individuals' memberships
- Provide MO with a way to schedule notifications or reminders for upcoming or overdue payments
-

Milestone 6 (Content Management – Public / Intranet)

Use Cases Served

- ZNA needs:
 - Public-facing content and document management
 - Meeting minutes and agenda tracking
- Blackfly Sustainable Living Co-Op needs:
 - A system restricted to members and not publicly accessible
 - A dashboard or homepage that centralizes key information for members.
 - A centralized repository for bylaws, policies, agreements, budgets, and historical documents.
 - Ability to upload, categorize, and retrieve documents easily.
 - Support for version control and document updates.
 - Maintain field records for ongoing forest stewardship commitments
 - A structured archive for board & membership meeting minutes.
 - Ability to search past meeting records and order by date, topic, or decision.
 - Support for annotations, comments, or discussions on meeting minutes.
 - A process for tracking decisions, action items and follow-up tasks.
- A hypothetical MO needs not only membership dues management, but also a public-facing website inc. public-facing pages and document management.

Goals

- Simple content management

- Simple document management
-

Milestone 7 (Member Interaction & Communication)

Use Cases Served

- ZNA needs:
 - Neighborhood discussion list usable exclusively by email (e.g. groups.io)
- Blackfly Sustainable Living Co-Op needs:
 - Members should be able to engage without needing to log into a website for every update.
 - Notifications for important updates, meeting reminders, and discussions.
 - Support for asynchronous communication (e.g., email updates, chat messages, or SMS alerts).
 - The ability for members to send messages, respond to discussions, and stay informed.

Goals

-

Milestone 8 (Campaigns)

Use Cases Served

- A hypothetical MO needs to solicit donations from its contacts using best practices

Goals

- Provide a campaign management system (e.g. Campaign Kit)
-

Long-Term

In no particular order:

- Short-link management
- Migrate to/from CiviCRM
- Accounting
- Voting