

MemberPath

Membership Operations Platform

Requirements Brief — v0.1

Organization

North Bay Tennis Club is a 600-member private racquet club in Sausalito, CA. Founded 1974. Has historically operated on a SAP-based legacy system (membership), email (court bookings), Excel (financial reporting), and paper sign-in sheets (guest policy enforcement). The board approved a single platform initiative in January 2026 with a target go-live before Memorial Day.

Roles

- Member — primary user. Books courts, pays dues, registers for clinics/tournaments, brings guests.
- Junior Member — restricted access (under 18). Cannot book primetime courts; guest privileges suspended.
- Membership Coordinator — staff. Onboards new members, processes referrals, manages waitlist, runs annual renewal.
- Pro Shop Manager — staff. Manages lesson scheduling, retail tab, ball machine bookings.
- Director of Tennis — staff. Approves clinic rosters, manages USTA team formation, runs tournaments.
- Operations Manager — staff. Court maintenance, lighting schedule, weather closures.
- Finance — staff. Dues billing, late fees, tournament fee reconciliation, F&B charge-throughs.
- Board Member — read-only across the org plus monthly executive dashboard.

Core Workflows

Member Onboarding

- Prospective member submits inquiry through the website with sponsor name.
- Membership Coordinator verifies sponsor in good standing; opens an application.
- Application moves through stages: Initial Review !' Background Check !' Board Vote !' Approved/ Declined.
- On approval, initiation fee billed; member portal access provisioned; welcome packet emailed.
- On decline, automated condolence with optional waitlist opt-in.

Court Booking

- Members book 1-2 days out (regular members) or 3-7 days out (premium tier).
- Booking includes player count (singles/doubles), partner names, optional ball machine.
- Cancellation policy: free up to 24h before; 24-12h forfeit half-fee; <12h forfeit full fee.
- No-shows tracked; after 3 in a 60-day window, primetime booking blocked for 14 days.

- Operations Manager can mark courts unavailable for resurfacing, weather, or events.

Clinics & Tournaments

- Director publishes a clinic with capacity, level, sessions, instructor.
- Members self-register; waitlist auto-promotes when a slot opens.
- Director can override registrations (e.g., balance level distribution).
- Tournament registration includes USTA NTRP self-rating; Director can adjust.
- Day-of: Pro Shop Manager runs the draw; results captured; ladder rankings auto-update.

Guest Policy Enforcement

- Member registers a guest in advance (name, relationship, prior visits this year).
- System enforces: max 6 guest visits per member per year; the same guest no more than 3 times.
- At sign-in, Pro Shop staff confirms guest in system; guest fee billed to the member.
- Junior members cannot bring guests.

Dues & Billing

- Annual dues auto-billed in two installments (Jan, Jul) per member tier.
- Late fees applied 15 days after due date; suspension flag at 60 days.
- Pro shop charges, F&B, lessons, and guest fees consolidate to monthly member statement.
- Members can dispute charges within 30 days; disputed items hold pending Finance review.

Approvals

- New member applications require Board vote (recorded with vote tally + meeting date).
- Court closures longer than 48 hours require Director of Tennis approval (member impact).
- Refunds over \$250 require Finance + Membership Coordinator co-approval.
- Tournament prize budgets over \$1,500 require Board approval.

Reports

- Member health: active / suspended / pending counts, demographic mix, retention curve.
- Court utilization heat map (by day-part, by court).
- Clinic profitability (revenue per session vs. instructor cost).
- Tournament outcomes log (draws, results, prize disbursement).
- Guest policy compliance: members near limit, repeat-guest patterns.
- Dues aging: 0-30, 31-60, 61-90, 90+ buckets.

Outputs

- Monthly member statement PDF (charges, payments, balance).
- Annual dues notice PDF (member tier, total, payment plan options).
- Tournament draw sheet PDF (printed at the desk).
- Daily roster (court bookings, lessons, clinics, expected guests).
- Board packet (monthly): KPIs, application pipeline, financial summary.
- Member-portal home (mobile-friendly) showing upcoming bookings, balance, club events.

Compliance + Audit

Member personal information (NTRP rating, court history, dues, guest log) is private to the member, their designated household, and staff with role-based need. Board access is read-only and limited to aggregated dashboards plus application packets they vote on. Every override (guest-policy waiver, late-fee waiver, suspension lift) emits an AuditEvent with the actor and the reason code.

Not in scope (v1)

- F&B point-of-sale (we charge through to member statement but POS lives in existing Squirrel system).
- Locker assignment (still managed at the front desk; v1 reads but does not edit).
- Native mobile apps (mobile-friendly web is enough; native is v2).