

Membership Tools and Techniques

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Membership Recruitment Techniques

- Slide Show (12 minutes or less) depicting way members volunteer in your organization...
- Pre-retirement talks at local employers...
- Reunion of former members (We would love to have you back if your schedule will allow.)
- Satisfied members sharing their experiences at any kind of group meeting...
- Contact college instructors to announce special student rates and networking and career growth opportunities...
- Recruit an entire group to join with your chapter...
- Bring a friend day at a special chapter meeting...
- PSA with local corporations employing case managers...
- Provide speakers on case management through a local speakers bureau...
- Maintain a jobs bank of information...
- Host a career day on case management...

Welcoming and Involving New Members

A large part of managing change in any membership organization involves welcoming new members. The key is to bring new members into the chapter family as quickly as possible.

The following steps are keys to that success:

Time your meetings so new members can attend

- Pay particular attention to member needs relative to their workday and geography.
- Be sure to go to them to get this information.
- Strive for ease of participation.
- Members will be active in the group that makes it most convenient for them.

Go out of your way to personally ask new members to attend

- Hold an orientation meeting or "Newcomers" meeting regularly aimed at all your new members who either have never or infrequently attend meetings.
- Divide the new members among the officers and make phone calls extending a personal invitation to each new member.
- Encourage old members to bring a friend.

Establish a "Designated Host" System

- a) Have you ever attended a meeting in which you didn't know anyone, and watched the old members of the group chat happily away throughout the meeting while you tried to blend into the wallpaper?
- b) Were you anxious to go back for a second meeting?
- c) The purpose of the designated host is to "make sure" anyone attending a meeting for the first time has an enjoyable experience.
 - Designated hosts are positioned at the door to watch for new faces.
 - When a new member arrives, the host escorts them throughout the meeting, introducing them to everyone, explaining what's going on, translating when appropriate, etc.
 - By the end of the meeting, the host should know as much as possible about the interests and background of the new member so a suitable position can be assigned quickly.
 - Past presidents make excellent designated hosts.

Create a mentor system

- This system works off the buddy principle in which each new member is teamed with a more experienced member.
- The senior member is expected to get to know the new member, act as their guide, and figure out how the new member can best be involved in the group.

Plan a new member project

- If a number of new members arrive as a group, develop and assign a project to them as a group.
- Such a project quickly gives them a sense of ownership and control in the activities of the organization.
- It also benefits the chapter by identifying those among the new members who are creative and able to fulfill leadership positions.

New Member Orientation

The goals of new member orientation should be to:

1. Inspire new members to become active and long-term members.
2. Provide a snapshot of your chapter and opportunities they have to fit in.
3. Meet key chapter leaders and members.

Outline of a dynamic new member orientation

Keep it brief and to the point...

- You want to ensure members are excited about joining your chapter...not dreading a boring meeting. Keep the program to a one-hour maximum with official presentations limited to 15 minutes.

Encourage key board members, officers and committee chairs to mingle...

- A few moments of a chapter officer's time can make a big impact on a new member. It's also a good opportunity to prospect for committee work. Relationship building helps the new member feel they are an important addition to the chapter and encourages an active membership.

Make sure new members are introduced to other new members...

- For some individuals, joining your chapter might be very intimidating. Linking up with a buddy helps to bolster confidence, attendance and activity.

Plan for and encourage networking at the orientation...

- Use this time to help new members learn how to build their own network through active participation in the chapter

Introduce new members to your chapter projects...

- And provide a sign up sheet for committee; task force or special projects...

Designate a seasoned chapter member or leader to follow up with new members within two weeks of attending the orientation...

Be sure to answer questions first, but also check to see if they want to participate on any chapter committees. Always be sure to extend an invitation to the next meeting.

Involving Current Members

1. While some members are more likely to volunteer than others, almost every chapter member can be recruited to participate.
 - About 80% of those directly asked to volunteer say yes.
 - This response rate is fairly consistent across all economic, geographic, racial gender and age categories.
2. The most productive route for volunteer recruitment is one-to-one or face-to-face personal request for a specific position.
 - This technique is even more effective if the person doing the asking is also volunteering (demonstrating credibility)
 - Or is a personal acquaintance of the person being asked.
3. Across the board, volunteers seem to follow a basic cost/benefit analysis in deciding whether to accept a volunteer position.
 - Benefits might include meeting a chapter need
 - a) The job itself (e.g., work the member enjoys or wants to learn about)
 - b) The other members involved (e.g., friends or colleagues)
 - c) Or some personal benefit (e.g., career recognition, educational or work experience).
 - Costs might include
 - a) Time commitment
 - b) Monetary expenses
 - c) Logistical complications
 - d) Or doubt that the member can meet the expectations of the commitment.
4. Don't take members for granted once you have recruited them.
 - View them instead as customers who will have needs that must be met on a continuing basis.
 - The trick is not to recruit the volunteer once, but instead to make them want to keep coming back.
5. A well-defined, satisfying job is a basic requirement for most volunteers.
 - Volunteers must have jobs that actually accomplish something
 - As well as interesting and challenging to the volunteer.

6. The work setting is as important to a volunteer member as it is to a paid staff.
 - Most volunteers will not continue doing work for which they are not suited.
 - It is crucial to match volunteers to the type of work that needs to be done, identifying both interest and ability.
 - One good technique is to schedule a 30-day check-in with volunteers after their initial assignments to see how things are going.
7. Volunteers are also affected by the people with whom they will work.
 - It is essential that a new volunteer be made to quickly feel as though they are one of the group.
 - A volunteer who is not welcomed and integrated into the social framework of the chapter is a volunteer who will never feel as though they are part of the organization.
 - And, will rapidly separate themselves from the organization.
8. Statistically, there seems to be a 60-day window of opportunity during which the chapter can help to shape the attitudes of a new volunteer.
 - If the volunteer doesn't feel as though they belong by the end of the 60 days, they begin to disappear.
9. Supervision is important to volunteers.
 - A good volunteer supervisor tries to proactively communicate with volunteers or at least be available for discussion.
 - The supervisor also needs to help the volunteer keep linked with the chapter, updating them on events, which the volunteer might have missed.
 - Good supervision includes challenging and assisting a volunteer to meet quality standards.
10. All volunteers need recognition, both on an individual and chapter level.
 - The trick is to find the mode of recognition, which most satisfies the volunteer.
 - Some prefer to be thanked by their supervisor, committee chair or board.
 - Some prefer to be recognized within the corporate structure through a letter to their boss.
 - Some prefer to be recognized among their peers.

Strategies To Help Your Chapter Get And Retain Members

Juggling Career/Family/Fun

Case management is by nature a stressful profession, combine that with the challenges of managing a career, family or aging parents and a fun, dynamic chapter program can be a truly magnetic experience...

- Do you offer carefully planned meetings that start and end on time?
- Do members get great ROI (return on investment) out of your meetings and events?
- Do you make certain every program is a good fit for your chapter members?
- Does your chapter strategic plan reflect this commitment to quality?
- Are your programs of interest to your members...are your meetings enjoyable to attend?
- Do your members linger after meetings for one more chance to network or catch up with colleagues?
- Do your programs include not only a helpful and timely information exchange but also a networking opportunity?

Retention Ideas

Retention is an ongoing process and when successful, it results in a members commitment to renew his/her membership.

- Does your chapter promote activity through regular and timely communication? For example, a newsletter that reports on activities in short bullets as opposed to long articles.
- Does your chapter offer opportunities to continually solicit new members?
- Does your chapter offer recognition of achievements?
- Do your members feel connected to the chapter leadership?
- Is your chapter leadership open to advice and suggestion?
- Does your chapter leadership solicit ideas for improvement?
- Are your leaders prepared for their meetings?
- Do your leaders work the room at events and strive to build relationships?
- Are your chapter leaders easily accessible?

Passionate Members

Case managers are passionate about their work...are your members equally passionate about your chapter?

- Does your chapter work to create some greater good that everyone is proud to be part of?
- Does your chapter review progress achievement via long range planning with annual evaluation of projects and programs?
- Does your chapter rotate at least one-third of the membership in all committees each year?

Networking

Dynamic networking opportunities are a key reason any professional joins an association like CMSA. A diverse and solid network benefits the chapter by increased non-dues revenue from prospective members. In addition, the process of moving from prospect to member takes place more easily and more quickly. And most importantly, successful networking draws a steady stream of interested new attendees. When exciting things happen, members stay members.

- Do your members feel like they belong to a group that truly cares about them? Member to member relationships are the emotional glue that creates activity.
- Does your strategic plan encourage chapter leaders to ensure building members' networks is a top priority and goal?
- Networking is a learned skill...many individuals are simply uncomfortable or even afraid to meet new people. Do you routinely build in programs that teach networking skills:
 - Use name tags to bolster confidence about remembering names.
 - Establish a "Mixing Committee" at each meeting or event to work the room. You want new members to immediately feel connected and avoid feeling awkward as they wait for someone they know to arrive.

New Members

Find lots of ways to welcome new members...

- A personal note from the president
- A welcome from a chapter pal
- An email message
- Remember, if a new member doesn't become active within 60-90 days, the likelihood of losing that member increases dramatically!

Just the facts, please...don't forget to address important facts that seasoned members take for granted.

- Information like...when are the meetings?
- What's the dress code at the annual conference? Your goal is to create a dynamic environment in which everyone feels empowered and informed.

Get new members active right away!

- The sooner new members get involved, the more active they will be.
- In your strategic process, do you have a plan to get new members to their first event?
- Are your members eager to step up to leadership opportunities? Active members are interested in what happens to their association.
- When you initiate new members right away, you dramatically increase the odds of them renewing at the end of their first year of membership.

Customer Service

- With today's technology, making information available is essential.
- Members and prospects expect to receive worthwhile information.
- These same technological trends have also changed customer service to more customized efforts to serve when, where and how the customer wants it.
- Similarly in the association business, we must focus on building one-on-one relationships with members, including member to member, member to staff, member to sponsor, etc.
- Everyone needs to feel they are a key component of the association.

Current Members

- Don't forget to utilize the talents of your existing membership to embrace new members.
- Such a strategy serves not only as a vital link in the orientation process, but also creates important opportunities for current members to stay involved and contribute in a significant way.
- Whenever possible, use programming that involves the membership.
- Interactive or experiential sessions create a dynamic yet comfortable environment.
- Seek speakers with innovative programming activities.
- Utilize the expertise of the membership not only for networking, but also for programming. Your goal is to build relationships with individual members and what better way to get them talking to each other. In addition, it's a great way for members to share best practices and find solutions for their individual challenges.
- Successful networking leads to increased problem solving skills through shared experience, best practices and efficiency.

Is Your Chapter Renewal Program On Life Support?

- How much chapter revenue comes from renewals? _____

- How much effort does the chapter put into the renewal program? (time/expense) _

- What is the response rate for each renewal project? _____
_____ How do we rate with the national average? _____

- Does your chapter have an annual calendar and schedule? _____

- Timing of activities/campaigns _____

- Number of hits per campaign? _____

- How does your chapter ask a member to renew? _____

- Is the request clearly understandable? _____

- Is the focus of the request on the message and mission of the organization? _____

- Is the piece easy to read and use? _____

- Is it personalized? _____
