Membership: Recruitment & Retention

National Association of Educational Office Professionals

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Preface

This publication is prepared by members of the National Association of Educational Office Professionals to promote and encourage professionalism in the workplace by providing members and affiliates with membership recruitment and retention suggestions.

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COMMUNICATION

Communication is vital to membership growth and retention. Membership chairmen need to make communication their #1 goal as they guide their committee work. As long as the communication lines are kept open and communication is relevant to the members, membership will grow. Every member needs to feel they are an important part of the association—not just by paying dues, but by being informed and invited to be a part of the decision-making process.

It is important that each new member is welcomed and instantly made aware of the opportunities the association has to offer. Equally important is the renewing members who need to know they are still an essential part of the association. Never let members feel like their membership dues are the only thing needed—everyone needs to feel needed and appreciated.

The ways to communicate have grown tremendously over the years as the use of social networks, email and text messages are abound. These are all viable ways to communicate to your membership; each with its own strengths and weaknesses. However, there is no substitute for personal communication—a personal note of welcome, or thanks for renewing.

Just one little note in the mail can make a huge difference in the lives of our members. It can show we not only care, but we care enough to take the time to personally write them. This can easily become a responsibility of a committee member. A sample note is included but it is just that—a sample. The more personal you can make your note, the better effect it will have.

SAMPLE NOTE FOR NEW MEMBER

Dear _____,

We are so excited that you have decided to join the ____________ Association of Educational Office Professionals! We are a dynamic group focused on information, recognition, service and fellowship. Our next meeting will be _______ and the program will feature ____________.

I hope to see you there! If you would like to help with this meeting, don’t hesitate to let me know. We want to include all our members in our planning and your ideas will be welcomed!

Sincerely,

Your name and contact information here

SAMPLE NOTE FOR RENEWING MEMBER

Dear _____,

How exciting to see your renewal membership posted! The ____________ Association of Educational Office Professionals is interested in your ideas and your needs as we plan the future activities of the association. Our next meeting is _______ and the program will feature ___________________. I hope to see you there!

If you would like to help with this meeting, don’t hesitate to let me know. We want to include all our members in our planning and your ideas will be welcomed!

Sincerely,

Your name and contact information here
PROGRAMMING

The programs offered by an association can serve as good membership recruiting tools. It is critical that your association offers meaningful workshops/classes at a time of day that does not interfere with the member’s working hours. These programs can be designed for professional or personal growth; however, occasional programs may have a fellowship goal.

It is important to give members what they want. They have many options for use of their time away from work. Unless the program speaks specifically to their needs and wants, they will not attend. We must remember that time is the new currency. Everything revolves around time well spent and that is what makes our programming successful or not.

There are many sources for speakers at the state and national levels; your board of directors and/or members may have speakers on several topics as well as contacts for speakers who charge nominal fees. Other sources could include your state or local administrator’s associations, credit unions, teachers – the possibilities are limitless! Viable, current speakers are available – it just takes some ingenuity to find them.

Options for meetings focused on fellowship may include dinner meetings to honor officers or administrators or fundraising activities that could fund scholarship opportunities for students and/or members. The sky is really the limit.

Just remember that programming must be pertinent and well planned. Time is of the essence!

AWARENESS

It is crucial that potential members know how to join the association and why they should join. They need to know how much the dues are and where to send them. Make sure the information is available to everyone, all the time. Make use of the association website, social media, newsletters, flyers, etc., to keep membership information at the forefront of your members and potential members.

Always remember that the promotion of membership is the same as selling any product. People must be aware of what the association is, what it represents, and what it can do to help them in their professional and personal lives. Salesmanship is important.

A good salesman is an informed salesman. Know your association; be the kind of member who will make others want to become members. Share everything you learn, all the time. Be persistent without being a pest, push without driving away, and be pleasant and helpful at all times.

A membership chairman or committee member needs to be visible at each meeting with a table equipped with membership forms, a calendar of upcoming events, and a smile. This area should be visible and convenient for all who attend and all should be encouraged to join. Always have someone prepared to issue a personal invitation to prospective members.

Communication, programming, and awareness are vital to the growth of an association. The membership chairman cannot be held responsible for all – it is a task for all the members, all the time.

“The basic building block of good communication is the feeling that every human being is unique and of value.”

Unknown
RECRUITMENT

Recruiting new members for your association is vital to the life of the association. It is important that people are aware of your existence and that you advertise consistently. Suggestions include:

- Put your association’s name on pencils, pads, folders, tote bags.
- Share your local/state/national association publications.
- Share programs from meetings or special events of the association.
- Listen to what the prospective member wants and match those responses to your association benefits.
- Share hand-outs from workshops you attend that are sponsored by your association.
- Give your personal testimony on why you are a member of your local/state/national association.
- Always have information at hand on upcoming meetings or events.
- Always have membership forms available.
- Include a membership application in every publication.
- Use name tags at all meetings.
- At the local level prepare a packet of information for every new office professional hired including information about membership applications for local, state, and national associations. A token gift is an added bonus. These should be hand delivered by a welcoming member.

Visitors to your meetings are potential members. Be sure to introduce them to everyone and never leave them standing or sitting alone. Perhaps assign a member to each visitor to make sure they feel welcome, know where things are, and what is expected of them. Invite your visitors to ask questions and be sure to follow-up with them. You might offer them a ride to the next meeting or event – sometimes people do not like to walk into a meeting alone. Encourage them to become involved on a committee.

Ideas for recruitment always start with an eye-catching membership brochure. Be sure your brochure includes the name of a contact person in case the visitor or interested person needs more information. It is important that the information on your brochure is pertinent and there is space enough to write all you are requesting. Above all, the address of the person the membership application should be sent to must be clearly defined.

The actual recruitment of a new member takes time and effort. Often you will be called upon to answer questions about the association. You need to be knowledgeable about the purpose, mission statement, and programs. Be sure to stay current on practices and procedures. Your answers may very well be the turning point to whether that person joins or not.

Until they find out what the association is about, first-time attendees may be reluctant to join. If they have a good experience at a workshop, a conference or an institute, they usually will not hesitate in joining. However, if the experience is not what they expected, it will take more work on your part to convince them of the worthiness of membership. Remember to stay calm and be patient. Sometimes it takes one or two visits to “sell” the association.

A quick search of the internet will provide you with ideas for recruitment. Others are listed here for your convenience – many of which have been used successfully over the years.

- Set cost of conferences/institutes/workshops for non-members higher than for members by an equal amount of the membership dues, thereby making them members at the time.
- Put a personalized note in the conference packet of those joining with their conference fees.
- Refund annual meeting registration fees to the person who recruits the most new members between two given dates.
♦ Publish a cookbook as a membership incentive. As members renew their memberships or as new members join, they receive a free cookbook OR they send in a recipe and the cookbook is sold as a fundraiser for the association.

♦ Hold a reception for prospective members that includes professionalism and fellowship. Make it fun and informative. Most of all, keep it short!

♦ Present the new member with a small gift of welcome – a letter opener, a pen, etc. – all with the name of the association clearly displayed. Use your creativity for this. It doesn’t have to cost a lot but can mean a lot.

♦ Present gift associate memberships to administrators so they can keep informed of the association.

♦ Hold a sale on new memberships at your annual meeting. Everyone likes a bargain. A $5.00 discount is enough to spur people into joining.

Memberships make excellent door prizes for any event!

RETENTION

Sparking enthusiasm among members and retaining their interest in and commitment to the association year after year is crucial to the health of an association.

People tend to give varying reasons for not attending meetings or renewing their membership. It is up to us to be prepared to give a response for each of these reasons to maintain our membership and grow.

1. You don’t have interesting programs.

   Plan interesting programs/speakers at all meetings. The program should be primary, the business secondary. 
   Keep the business meeting as short as possible, and keep the programs exciting and relevant to professional or personal growth.

2. I felt alone; not a part of the group.

   Make sure new people feel a part of the group; introduce new members (use name tags); hold a simple induction ceremony for each new member and present each with a small token, such as a flower, membership card, copy of the bylaws; assign one or two members as greeters and mentors for each meeting.

3. I was never offered a responsibility on a committee or asked to hold an office.

   Give new members a choice of two or three committees on which to serve. If the member serves capably the first year, ask the member if he or she wishes to serve as an officer; if so, put his or her name on the ballot for an office.

4. I’m too tired after I’ve worked all day or I don’t like to give up my weekends.

   A good response to this one is, “I know what you mean. It does take special effort; but we are worth that extra effort. I’ve never gone to a meeting or program yet where I didn’t learn something.” It is very true that fellowship is 75 percent of the joy of being part of an organization.

5. The meetings are too long.

   Set a starting time and an ending time and stick to it!

6. I never know far enough in advance when the meetings are being held.

   Publicize well—newsletters, and special notices, etc. Set dates for all meetings at the beginning of the year and distribute the meeting dates to all members and all prospective members. Then send notices two weeks in advance of each meeting.
RECOGNITION

Recognize members for their accomplishments. These do not have to be “headline” accomplishments. It could be for a promotion, bowling a perfect game, activity in a civic organization, etc.

Each state and local organization should have its own recognition for those who have earned Professional Standards Program (PSP) certificates or the Certified Educational Office Employee (CEOE) distinction. There is no need for an elaborate ceremony, perhaps just a brief ceremony at an association meeting to present a resolution or certificate for that purpose. This is an excellent way to advertise the Professional Standards Program and promote NAEOP. Everyone will want a certificate!

An association can be a tremendous support group. Assign someone to send cards and other expressions of friendship and encouragement in times of illness, death, or hardship.

Keep a record of attendance. When a person has missed three meetings, send a note, call them, or make a personal visit. “You missed a good meeting; and we missed a good member—you!”

Send clever notices regarding the expiration of membership. Local associations should keep records of names and expiration dates for the state and national associations, as well as local memberships. This does take extra work, but it is well worth the effort in keeping the member involved in every area of professional activity.

State associations should also keep records of the local association to which a member belongs as well as the NAEOP memberships. Membership applications should have space to indicate memberships in local, state, and national associations if they exist.

REACTIVATING THE INACTIVE MEMBER

A suggestion to keep members active would be for every organization to have an official re-activator. This member’s responsibility is to contact inactive members and reactivate them.

The re-activator might contact an inactive member and ask for help with a garage sale, help with a specific job requiring a limited amount of time, or ask the member to assist with a project that can be worked on at home. Of course, the re-activator would then encourage that member to come to the annual recognition luncheon or dinner so proper recognition can be given.

EIGHT TIPS FOR RETAINING MEMBERS

In an August 31, 2011, SLSAE.org article, Jacinta Hannaford and Candice de Chalain provide these tips for not-for-profit organizations.

1. Remind members of the benefits.

Members should constantly be reminded of the benefits of their membership year-round but particularly before they are due to renew their membership, which is usually every fiscal or calendar year. A simple way to do this is to provide a summary of the benefits members have received in the previous year and what they can look forward to in the coming year, alongside the membership renewal form.

2. Keep your promises.

Make sure your association lives up to its promised membership benefits; otherwise, your members will feel dissatisfied and will be unlikely to renew their membership.
3. Provide value beyond the expected benefits.
Members expect benefits from your association, such as regular and relevant industry updates, discounted events, networking opportunities, and government lobbying. These are their reasons for joining; however, members stay because their interaction with your association is positive, and they believe the investment is worthwhile. This means providing additional value, including useful resources such as a newsletter or magazine.

4. Create a sense of belonging to foster loyalty.
Members who feel they are an integral part of their association’s community develop a sense of loyalty to their association. Creating a sense of community around your association can be achieved by allowing members to come together and talk to you and to each other. This can be achieved through both online platforms and face-to-face at member events. Another simple way is to provide lapel pins to all members so they can proudly display their membership with the association and feel part of a community.

5. Make your association relevant.
Members need to feel that their membership holds personal relevance. Associations can foster this by creating special events for special interest groups of the association, such as a ‘young professionals’ or ‘women’ group. This allows members to feel recognized and part of a personally identifiable group.

An annual renewal campaign is a time to remind members of the benefits of being a member. It’s also an opportunity to provide members with an incentive to renew their membership. Popular incentives include: free registration to the first networking event of the year, membership discount, free gift and exclusive benefits such as an industry whitepaper.

7. Create membership levels to which members can aspire.
Members are more likely to remain members if they feel they will be rewarded for their commitment. This could include the prestige and privileges of a senior membership level.

8. Reward loyalty.
Make long-time members feel valued. This could be as simple as providing professional certificates for 10, 15, and 20 years of being a member. The certificates are likely to be framed and displayed in members’ offices or homes with a sense of pride and achievement. Alternatively, you could offer awards for long-term members at your event or gala dinner.

IT’S THE PERSONAL TOUCH
The challenge and responsibility of membership belongs to every member of the association. Next to the presidency of the association, the membership responsibilities are the most time-consuming and the most important. An association with a continuous dwindling membership will not exist for long. One clue is given in an article in the Summer 1985 issue of Elected Leader – “It’s the personal touch that makes the difference.”

1. Provide new members with identifying ribbons attached to their name tags at meetings.
2. Welcome each new member with a personal letter from the president and a packet of information about the association.
3. Leaders of the association should host a reception for new members at conferences.
4. Recognize long-standing members with longevity certificates—much like corporate service awards.