



# **Book 4**

# **Membership**

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### Membership

Membership is the name of the game. The association - and every local chapter - must depend on actively involved volunteer members if it is to achieve its goals and objectives. Most chapter members are aware of the importance of a strong membership. But members are often uncertain about their part in the chapter's recruiting and retention efforts.

Many of the ideas and programs presented in the following pages have been taken directly from the successful experiences of AFE chapters. Also outlined are ideas for promoting the benefits of membership in AFE to prospective members. These ideas are presented as suggestions, so the chapter should feel free to fit the methods and procedures to the specific needs and abilities of the chapter.

The later portions of this section address the challenge of membership retention. Too often, chapters stress the recruitment of new members but don't take the necessary steps to retain current members. No progress is made if an existing member is lost for every new member who is recruited.

#### **Why Recruit?**

Members are the lifeblood of any association. Members provide the support that is needed to successfully carry out the programs and activities which have been planned for the chapter. It is the members who must identify needs, establish goals, design and participate in programs and activities to achieve those goals.

A strong, growing membership also facilitates the exchange of ideas and information. One of the most important benefits of membership in AFE is the opportunity to meet and discuss problems with other plant engineers and facilities managers in your area. Each new chapter member brings a sizeable wealth of knowledge, experience and fresh ideas to share with other members of the chapter.

Chapter members also provide the financial resources needed for the chapter to operate successfully. Because most chapters do not participate in fundraising activities, membership dues and fees are the primary source of income for the chapter.

It is also important to remember that the chapters serve as a training ground for future AFE leaders. Every member of the association has an opportunity to participate on the local, regional and national levels. When the chapter recruits a new member, it is "recruiting" for both the chapter and association. To become a member of a local chapter, one must belong to AFE national.

#### **Organize for Chapter Growth**

The first key to a concentrated and organized membership recruiting and retention program is the appointment of a membership chairman. The main criteria to look for when selecting the chairman are a keen interest in building membership and an ability to organize. The chairman of the membership committee should have full knowledge of AFE's chapter programs and activities, to be able to relate the benefits of membership to prospective members in a meaningful way.

Once the membership chairman has been elected or appointed, other members should be enlisted to serve as committee members. When selecting members of the membership committee, it is especially

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important to choose only those individuals who have: (1) high interest; (2) enthusiasm; and (3) the ability to sell. (Vendors/suppliers are prime candidates for the recruiting team. Not only do they have the skills and personality to sell, they see many prospects regularly)

Other factors that should be considered are:

- Does the member have time available to make a positive contribution to the committee?
- Does the member have a working knowledge of the goals and objectives of the association, the benefits and services available to members, and the basic requirements for membership in AFE? Will that knowledge come through effectively?
- Is the member capable of aggressively working with prospective members? Can that person show membership benefits as solutions to problems?

Once the membership committee has been formed, its first task is to review the membership needs of the chapter and establish identifiable, measureable goals for recruiting and retention. When establishing these goals, the committee should consider the number of potential members in the area; the sources for these new members; the number of members needed to achieve the chapter's overall goals and objectives; and what methods of membership recruiting and retention are available to the chapter.

For example, let's assume that an AFE chapter currently has 40 members. A survey of a local utility company mailing list, industrial directories, etc., indicates there is a minimum potential of 40 additional chapter members within the area served by the chapter. After analyzing this data, the membership committee agrees that the chapter's membership base should be increased by 15 members during the year. Since past experience indicates that 3-5 existing members will fail to renew their membership, a goal of 20 new members is established for the year. This goal ensures that the membership base will be increased by at least 15 members by the end of the administrative year.

Once the goals and objectives for recruiting and retention have been established, the membership committee should present these goals in writing to every chapter member. By making each member aware of the established goal, the committee makes it easier for every member to actively participate in the recruiting and retention efforts.

The first step in designing recruiting or retention programs is to review last year's campaigns. What worked and why? What didn't work and how can it be improved? What else can we try? By combining proven methods with new innovations the membership committee should be able to design a successful recruiting and retention campaign which will enable the chapter to meet its membership goal.

Many chapters consider membership drives to be low budget projects. Although it may not be necessary to expend huge sums of money on recruiting and retention, the membership committee should prepare an annual budget of income and expense, which should be part of the chapter's annual operating plan. Materials such as chapter stationery, envelopes, stamps, brochures, etc., should each be considered. The committee should never be afraid to request the funds needed to implement a successful recruiting campaign.

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The membership committee's proposed budget should be submitted to the chapter's planning and budget committee (or executive committee) so that this can be included in the annual chapter operating plan/budget. The total budget is then approved by vote of the chapter.

A timetable for achieving membership objectives should be in the plan. Establishing deadlines helps to coordinate the efforts of the committee and makes it easier to measure interim goals against annual objectives. The timetable for achievement should be in writing and should be distributed to every chapter member. Once again, this type of printed information helps every chapter member identify his or her part in the recruiting and retention effort.

After the goals and objectives have been established, programs designed, budgets completed, and schedules for completion established, the final step is to assign specific duties and responsibilities to members of the committee and the chapter. Every member should be fully aware of what is expected as well as the dates on which specific projects and assignments are to be completed. It is only by coordinating every aspect of the recruiting and retention campaigns that the chapter can hope to be successful in meeting its membership goals.

#### **Identifying Sources of New Members**

One of the primary sources of new members is your current chapter membership. Every chapter member should be able to provide the name of at least one co-worker or acquaintance who would qualify for membership in AFE. Members of the chapter who are consulting engineers or sales engineers have customer lists which they should be willing to share with the chapter. Other local sources of prospective members include:

- Guests invited to chapter meetings
- Non-member registrants at AFE seminars, conferences and trade shows
- Mailing lists of local utilities (include institutions, commercial buildings)
- Membership lists from other associations (who address portions of the market)
- Manufacturer's listings from the local chamber of commerce
- Regional trade magazine mailing lists
- Social media sites such as LinkedIn.com

AFE Headquarters maintains an extensive computerized list of member prospects throughout the United States and Canada. These lists are maintained in zip code order and are available to the individual chapters on request. When requesting a prospect list from AFE Headquarters, please provide the postal zip code (from lowest to highest) for the area served by your chapter.

One goal of the chapter membership committee should be to develop a chapter prospective member file. Information on prospective members can also be retained on a simple spreadsheet. Each sheet would include the prospect's name, title, business address, phone number, etc. Records of previous contact with the

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prospective member, attendance at chapter meetings, etc., should be maintained in the file so that the membership committee will have an accurate profile of the prospective member's interest in AFE.

#### **Promoting Member Benefits**

Once a list of prospective members has been compiled, the real work of attaining chapter membership goals begins. The first step is to make your prospective members aware of the benefits and services offered by the association. Demonstrating how AFE serves today's plant engineers and facility managers creates a positive image for the association and your chapter. If the prospective member views AFE as an important opportunity to meet with others with similar responsibilities, he or she is more likely to seek membership.

Although the chapter's speakers, tours, seminars and other professional activities are usually not a function of the membership committee, the programs and activities have an important impact on the membership committee's ability to achieve its goals. If membership in AFE is to be desirable, the chapter's programs must be designed to meet the needs of both members and prospective members. If the chapter's programs are out of tune with the needs of prospective members, chances are that prospects will have little interest in becoming actively involved the chapter.

Many AFE chapters use direct mail campaigns, blast faxes, e-mail and e-newsletters to invite prospective members to participate in chapter activities. The following are basic steps in a typical campaign.

**STEP 1:** Draft a promotion letter, email or blast fax piece to be sent to each prospective member. The more these are personalized, the better. The letter often acknowledges a previous indication of interest in AFE by the prospective member and includes an invitation to your next chapter meeting. Included with letters should be a membership brochure, a copy of the chapter's annual schedule of activities, and the name, address and phone number of the chapter member to be contacted for further information. Follow this up by initiating the contact by phone. This same information can be conveyed in the emails and blast-fax promotion pieces.

**STEP 2:** After a prospective member indicates an interest in AFE, assign that person to a member of the membership committee. The committee member should extend a personal invitation to attend a future chapter meeting and should be ready to answer questions about the chapter's activities and the benefits of membership. Be sure to equip each committee member with the information needed to answer such questions completely.

**STEP 3:** When the prospective member attends a chapter meeting, he/she should be welcomed at the door by the chapter president and the membership committee chairman. The president then introduces the guest to several other members of the chapter who, in turn, introduce other members of the chapter and make sure that the guest feels welcome. If possible, the membership committee member who extended the personal invitation to attend the chapter meeting should serve as the guest's host during the meeting.

**STEP 4:** Immediately after the chapter meeting, members of the membership committee should again

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contact each prospective member. This should be by phone, personal letter, and personal visit...a combination of the three if possible.

Prospective members who attended the chapter meetings should be thanked for their participation and should be invited to other chapter functions. This is also an excellent opportunity to invite the prospective member to join AFE.

Prospective members who failed to attend the chapter meeting should also be contacted. The committee member should express the chapter's disappointment that the prospect was unable to attend and should invite him to a future meeting. The AFE member should also offer to provide any additional information the prospective member might want in order to become more familiar with the chapter and the association.

The importance of this type of follow-up cannot be overstressed. Most chapters have found that two or three contacts with a prospective member are needed before the prospect decides to join. Sometimes it even takes five or more contacts. Tenacity pays off!

**STEP 5:** If a prospective member fails to respond to several invitations to attend a chapter meeting, the name should be dropped from the chapter's primary prospect list. These names should be transferred to a secondary prospect list so that the membership committee can contact them again later.

### **Make Every Prospect a Friend**

Letters, posters, brochures, etc., tell the AFE story. But personal contact is still the single most effective method of recruiting new members. Everyone has the need to belong. The successful chapters welcome prospective members and make them feel that they have an important place in AFE.

A prospective member may be impressed with a letter from the chapter inviting participation in the next chapter meeting. However, the letter itself will not make that person feel welcome. That is the job of the current member who makes a phone call to extend the personal invitation to participate. The fact that the member has taken time to make the call proves to the prospective member that AFE is interested in that person and is anxious to have him or her as a member.

Walking into a room full of strangers can be one of life's most difficult moments for many people. That is why the chapter president and membership committee chairman should greet each prospective member at the door and introduce other chapter members. This personal touch makes the prospect feel welcome and can often add the motivation needed to join the association.

Your job is not finished when the prospective member completes a membership application. You must now give your new member a proper welcome to AFE and the chapter. Each new chapter member should receive a welcome letter from the chapter president. This letter should be mailed to the new member immediately and should include an invitation to the next meeting.

When the individual attends the first chapter meeting as a new member, he or she should be formally introduced to the other chapter members. Remember, when a new member joins AFE, he or she may no

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longer be a target for your recruiting efforts, but immediately becomes a target for your member retention efforts. One way to lose new members is to “abandon” them after they sign the membership application. Make every effort to make these new members feel welcome in AFE. Get them involved quickly.

#### **Member get a member**

As outlined earlier, the membership chairman and committee have indicated that they have the primary responsibility for membership recruitment and retention. The most successful campaign, however, will utilize every member of the chapter as an integral part of the “sales force.” Although the membership committee carries the ball, every chapter member must actively participate.

For example, if every chapter member brought just one qualified prospective member to a chapter meeting, the chapter could double its size each year! When the chapter views its recruiting roles in these terms, the seemingly impossible task of recruiting 15-20 new members during the year suddenly becomes a very attainable goal.

The first function of your annual recruiting campaign should be a chapter meeting during which each chapter member receives the details of the campaign, the goals for the year, and the details of his anticipated participation. This “kick-off” session should be included as a part of the first meeting of each administrative year. The membership committee chairman can then provide progress reports periodically throughout the year.

Some type of visual chart or graph, showing your chapter’s progress in achieving the recruiting goals you have set, can be an important plus in the membership campaign. Make sure the message conveyed by the visual presentation is also incorporated in your mailing, and that every member of the chapter receives these mailings so they will have complete information on the progress being made.

#### **Incentives to Win**

The tone, spirit and conduct of your membership campaign should be designed to suit the character of your chapter. However, the membership committee should always attempt to conduct its campaign in a way that will generate spirit and enthusiasm. The atmosphere at your kick-off meeting, and the announcements at subsequent chapter meetings, should be charged with excitement and enthusiastically presented. Presentation and reports should be snappy, concise, to the point, and should be designed to reinforce the positive atmosphere.

One sure way to ensure that the atmosphere remains spirited is to offer performance incentives. Divide the chapter into small groups and then let each group compete to determine which can recruit the largest number of new members. Each member of the winning group would then receive a small reward for successful performance.

Publicity for the purpose of recruiting new members should be included as an integral part of the chapter’s overall publicity and public relations campaign. Information concerning the benefits of membership, where to obtain information about AFE membership, and the name, address and phone number of a chapter contact should be included with all publicity announcements.

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In most metropolitan areas, there are trade publications and neighborhood newspapers that will publish news releases and meeting announcements at no charge. Most radio stations and cable television systems broadcast service announcements at no cost to the association. Publicity gained from area seminars, special chapter events, and other projects can be most effective in building awareness of AFE among non-members.

#### **Membership Application Information**

Memberships are renewed by anniversary of date of application each year.

*Taken from the AFE by-laws*

**1. Classes of Membership.** There shall be three classes of members.

(a) **Regular Member.** An individual actively employed in the profession of plant engineering/facilities management. This class of membership is a full voting member of AFE and may hold all local, regional and national offices of the Association. Within the Regular Member class, the Board of Directors may create subclasses of individuals, for unique recognition, such as: affiliate, retired, fellow, honorary, life, unemployed, who shall be recognized as such without affecting any voting rights.

(b) **Student Member.** An individual enrolled as a full-time student in an accredited institution of higher learning who intends to pursue a career that would involve, or interface with, plant engineering/facilities management. This class of membership may have voting rights within their respective chapters only.

(c) **Organizational Members.** Corporate/business membership for business entities with an involvement in plant engineering/facilities management. Specific criteria for such membership may be set by the Board of Directors. This class of membership will have no voting rights.

**2. Chapter Membership.** All AFE Regular and Student members are encouraged to join a recognized AFE Chapter. An individual that does not designate an AFE Chapter is a Member at Large (MAL).

**3. Dues.** (a) The Board of Directors shall establish the membership term and a schedule of fees for participation in the Association's activities. Payment of such fees or dues shall be a condition of membership. No dues, fees or assessments shall be refunded to any member whose membership terminates for any reason.

(b) A portion of annual dues, as determined by the Board of Directors, collected by AFE shall be remitted to the Chapter designated by an individual. No portion of a year's dues shall be rebated to another Chapter if an individual transfers.

#### **Membership Retentions**

Each year, a percentage of AFE members choose not to pay their annual dues and renew their membership. Obviously, job changes and transfers are inevitable and can often make it impossible for members to continue to participate. However, the majority of members who fail to pay their annual dues do so because

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they are dissatisfied with AFE chapter programs and member benefits. Past experience has proven that the majority of these members would continue their membership if they received the same type of personal attention devoted to prospective members.

Many of the same techniques used to attract prospective members will help the membership committee to retain existing members. Anniversary membership renewal statements are mailed to all members of AFE three months prior to their expiration date. During this three-month period, the membership committee should personally contact every member of the chapter and urge the renewal of membership for the coming year.

AFE headquarters assists the chapter's retention efforts by providing monthly listings of members who have failed to pay their annual dues. Each unpaid member should receive a personal telephone call from a member of the chapter's membership committee. Some members simply "forgot to pay" while others have more serious reasons for their reluctance to renew their membership. The result of each follow-up phone call should be recorded so that the chapter will have a better picture of why members have chosen to drop out.

The ability of the membership leader to identify and communicate benefits to the individual member is the key to success. Therefore, it is vitally important that you work closely with the other officers of the chapter and the committees.

Before a volunteer can be successful in growing their chapter membership, a few myths need to be identified and clearly explained.

**Myth 1 – Recruitment and Retention get equal resources.** In reality, many chapters want to dedicate all their time and money to bringing new people into the chapter and do not maintain effective steps to keep members. If the chapter hopes to maintain long-term growth, emphasizing retention is the wisest investment your chapter can make.

**Myth 2 – There is always one more new member to recruit.** When a member is lost, two must be recruited in order to show growth. When you retain a member however, growth occurs with every new recruit.

**Myth 3 – Members will renew no matter what.** Chapters can no longer depend upon inertia of members to renew. In this day and age, members are always evaluating the value of something and will pick and choose where to invest their time and money. Membership in an association is no exception; the chapter must deliver the goods!

**Myth 4 – Just send a new member a letter.** Simply sending a new member a welcome letter from the chapter is not enough. These individuals have a special need and by dedicating a few additional hours and resources to provide a personal touch to welcoming them, you can convert them to lifetime members.

**Myth 5 – Retention begins the moment a member joins.** Chapters must change this mindset to realize that retention is tied, in part, to how a member was recruited. Staying involved in an organization starts with the first contact, even before they send their dues money.

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#### **Recruitment and Retention Strategies - Responsibilities by month**

So, how do membership leaders implement a successful membership plan? The following pages detail a month-by-month guideline that membership committees, and their chairman, can follow throughout a one-year term of office. These actions are standard operating procedures for any chapter membership plan, but they are not limited to their specific actions.

Chapters are encouraged to develop their own initiatives within these guidelines.

#### **Every Month**

- New Members
  - Chapter president and membership chair receive new member list from AFE Headquarters. Send out customized welcome letters or emails from president and note next chapter meeting
  - Membership chair assigns committee member to give “welcome phone call” to new member
  - Membership chairman provides new member information to newsletter editor to add to chapter mailing list and publish welcome in next edition
- Prospective Members
  - Chapter president and membership chair receive prospect list from AFE Headquarters and send out customized letter highlighting benefits of chapter membership
  - Membership committee makes follow-up calls 1-2 weeks after above mailing
  - Membership committee sends final follow-up letter two weeks after phone call. Letter should be customized based on feedback from phone calls.

#### **JANUARY**

- Coordinate with chapter executive board
  - Meet with committee and identify membership plan for the year to meet or exceed goals of the national AFE Membership Committee
  - Provide quarterly report to chapter executive board
  - Meet with chapter vice president on quarterly basis to develop long-term strategies
- Current Members
  - Membership committee members make 6-month follow-up call to previous August new members – solicit input about chapter activities and remind them of member benefits, upcoming activities, etc.

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**FEBRUARY**

- Coordinate with chapter executive board
  - Assist chapter vice president with completion of chapter evaluation
- Current Members
  - Chapter president writes a one page summary of chapter activities, yearly goals, upcoming national events, chapter activities; and sends to all current members and prospects.
  - Membership committee members make 6-month follow-up call to previous September new members – solicit input about chapter activities and remind them of member benefits, upcoming activities, etc.

**MARCH**

- Current Members
  - Membership committee members make 6-month follow-up call to previous October new members – solicit input about chapter activities and remind them of member benefits, upcoming activities, etc.

**APRIL**

- Coordinate with Executive Committee
  - Provide quarterly report to chapter executive board
  - Meet with chapter vice president to develop long-term strategies
- Current Members
  - Membership committee members make 6-month follow-up call to previous November new members – solicit input about chapter activities and remind them of member benefits, upcoming activities, etc.

**MAY**

- Current Members
  - Membership committee members make 6-month follow-up call to previous December new members – solicit input about chapter activities and remind them of member benefits, upcoming activities, etc.

**JUNE**

- Current Members
  - Membership committee members make 6-month follow-up call to January new members – solicit input about chapter activities and remind them of member benefits, upcoming activities, etc.

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**JULY**

- Current Members
  - Membership committee members make 6-month follow-up call to February new members to solicit input about chapter activities and remind them of member benefits, upcoming activities, etc.
  - Regional membership chairman provides chapter one-page summary letter of AFE national efforts, activities and programs, focusing on results from June planning meeting and board of directors meetings, and highlighting the Facilities America conference.
- Coordinate with Executive Committee
  - Provide quarterly report to chapter executive board
  - Meet with chapter vice president to develop long-term strategies

**AUGUST**

- Current members
  - Membership committee members make 6-month follow-up call to March new members – solicit input about chapter activities and remind them of member benefits, upcoming activities, etc.

**SEPTEMBER**

- Current Members
  - Membership committee members make 6-month follow-up call to April New Members – solicit input about chapter activities and remind them of member benefits, upcoming activities, etc.

**OCTOBER**

- Current Members
  - Membership committee members make 6-month follow-up call to May New Members – solicit input about chapter activities and remind them of member benefits, upcoming activities, etc.
- Coordinate with Executive Committee
  - Provide quarterly report to chapter executive board
  - Meet with chapter vice president to develop long-term strategies

**NOVEMBER**

- Current Members
  - Membership committee members make 6-month follow-up call to June New Members – solicit input about chapter activities, remind them of member benefits, upcoming activities,

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etc.

- Chapter president writes annual report of chapter activities for the year, highlighting new sponsors, future plans, and incoming slate of officers.
- Incoming chapter president sends letter to Current Membership noting goals for the year, ideas for new programs and services, and encloses “chapter evaluation” for member to complete and return.

#### **DECEMBER**

- Current Members
  - Membership committee members make 6-month follow-up call to July new members – solicit input about chapter activities and remind them of member benefits, upcoming activities, etc.

Individual members are the lifeblood of any volunteer organization just as the employees of any company are the difference in success and failure. Other books in this manual will further address and instill this factual, real world concept