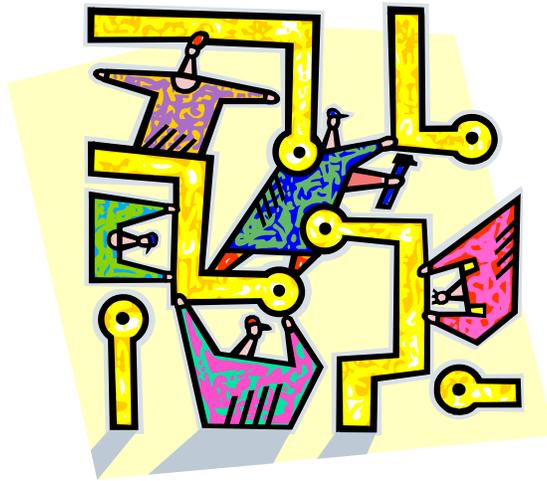


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# Building Membership Builds Power



*A Step-by-Step Guide to Strengthening Membership  
in MRTA Units*

March 2008

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**A Workshop for  
Missouri Retired Teachers Association  
and  
Public School Personnel**



## **Lay the Foundation** **It's all about the Member!**

In today's busy world, it's not enough to have a great organization. To attract and keep members, our organizations need to provide clear and valuable benefits to prospective members. And we need to communicate those benefits consistently and frequently to rise above the "noise" of day-to-day life.

You are here because you are committed to the MRTA and you want to see it continue to grow and become a force within the state of Missouri – one that recognizes and supports the years of service provided to the public school system by teachers and school personnel.

This workshop will provide a step by step approach to finding, recruiting, involving and retraining members.

### **Step #1: Send a Clear, Consistent Message**

Prospective members may hear about MRTA from many sources: fellow teachers, unit and state association leaders, local and statewide events, news stories, printed materials, advertising, direct mail and more. Repetition increases the probability that the prospect will take action and join – if that repetition is clear, consistent, and compelling.

*The first step to strengthen our membership program is to create a standard way that we can all describe our respective organizations.*

This description is sometimes called an "elevator statement." It is short enough to be delivered during a ride up an elevator. It is focused on benefits to the prospective member. It uses the word "you" frequently. And it invites more conversation and action.

The purpose of our elevator statement is to provide a clear, compelling, concise, and consistent way for each of us to talk about joining MRTA. We only have about 20-seconds to share our elevator statement with a prospective member – so we need to focus on the most important benefit(s). We want that prospective member to quickly understand the purpose and value in becoming active with MRTA.

**Activity 1: Developing Our Elevator Statement**

List the two or three *most* important things that MRTA does for members:

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Why are these benefits important to a member?

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Word Play

Nouns	Adjectives	Verbs	Adverbs

Crafting a statement:

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What steps do you need to take to put this statement in use group-wide?

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## Frame in the Walls! Recruiting New Members

Our organization has thousands of potential new members. And there are dozens of ways to recruit them. This section offers some tips on how to set priorities and assure a recruitment program that optimizes resources and builds power.

### Step #2: Who Do You Need?

To effectively grow our organizations, we need a broad base of members who represent all geographic, demographic and ethnic areas. Some examples include:

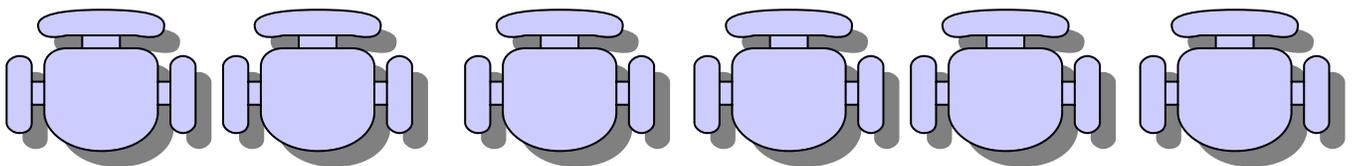
- Representation in key legislative districts (geographic diversity)
- Representation of important constituencies (Baby Boomers, administrators)
- Representation of Cultural and Ethnic Diversity

Does your membership reflect the community you serve? Who are you missing? Younger or older retirees, more men or women, more Hispanic or African-American members, more rural or urban members?

These are just a few examples of who you may need to recruit to create an effective volunteer support system... There are undoubtedly others.

### Activity 2a: Six Empty Chairs

Imagine that there are six empty chairs at your next MRTA meeting. Who would you like to see sitting in these chairs? We are looking for TYPES of members – and here we are using “type” to mean demographics – younger, older, ethnic, urban, rural, etc. We are not looking for personal characteristics of members (e.g., dedicated, eager, etc.)



- Individual work
- Table Work
- Feedback to Group
- Organizing and Naming

## **Activity 2b: Membership Resource Carousel**

Now that you have identified the types of people you want as potential members, it is time to get a bit more specific. This is a powerful tool that will help you get specific names and contact information on the people you want to recruit as members. This tool draws on the collective wisdom and connections of everyone in your group and helps you generate a substantial list of prospects for membership.

There are two ways to do this:

1. From the final step of [Activity 2a](#) (*organizing and naming*) choose the “top six” target populations named in the process. Put one title on the top of each carousel worksheet. These will be the focus of your entries on the sheet.
2. A second approach is to look at different and accessible “sectors” in your community. This is particularly valuable when you are trying to recruit different types of individuals to become involved in a specific project. Sectors could include:

**Voluntary Sector:** Organizations where potential MRTA members are performing community service or other volunteer activities (e.g., Senior Centers, Red Cross, Church/Temple Groups).

**Public Sector:** Individuals in local or state government or public service agencies who were or know retired teachers and school personnel or who have political connections that are beneficial to retired teachers and school personnel.

**Private Sector:** Local business owners and operators.

**Informal Sector:** People you meet in your daily activities (e.g., hairdresser, librarian, neighborhood friends, social clubs, etc.)

**Lapsed Members:** People who have been active in MRTA but have stopped actively participating. Someone who has already joined MRTA in the past is most likely to join again.

**House Prospects:** These are folks who have already had contact with our organizations but have not yet joined. They may have come to an event, participated in Lobby Day, or attended a meeting with a friend.



# Raise the Roof!

## Overcome Barriers to Seal the Deal

### Step #3: Overcoming Barriers

#### Activity 3: *WIIFM*

Now that you have identified the important types of prospects for building your membership base, it is time to step out of your own shoes and “walk a mile” in the prospective member’s shoes.

- Who is the target group?
- What would THEY see as benefits to joining?
- What are their objections to joining?
- What concrete steps do we need to take to overcome objections?

Our target audience is: \_\_\_\_\_

We think they will find these aspects of membership beneficial:

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We may hear the following objections or challenges with this target audience:

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We can overcome these challenges by:

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We will measure success by: \_\_\_\_\_

## Wire Up!

### Power up your Recruiting Efforts

#### Step #4: Developing a Plan

Choosing the appropriate avenue to contact potential members is an important step in successful recruitment. The more important the prospective member is to you strategically, or the fewer there are of them, the higher up the “ladder” of techniques you will want to go to assure success. Also, the higher up on the ladder a technique is, the more time-intensive it is. Time spent by volunteers recruiting members one-on-one is time they can’t spend lobbying the Legislature or doing other activities.

The “ladder” below lists the most common recruitment techniques and estimated response rates for each recruitment tactic.

#### Relative Effectiveness of New Member Recruitment Techniques

	In-Person One-to-One Contact with Leadership or Known Contact	40-50%
	Attending Event with Leadership or Known Contact	15-30%
	Telephone Contact with Leadership or Known Contact	15-25%
	Personalized Letter or Email from Someone Known	10-20%
<input type="checkbox"/>	<i>Relationship Building</i>	
	Personalized Mail (to a cold prospect)	2-6%
<input type="checkbox"/>	<i>Targeted Contact</i>	
	Bulk Direct Mail	0.5-1.5%
<input type="checkbox"/>	<i>Ease of Response</i>	
	Lead Generation	0.1%
<input type="checkbox"/>	<i>Awareness Building</i>	
	Display Ad or Website	0.01%

### **Activity 4: Matching Recruiting Strategies with the Target Audience**

From the information generated in the Carousel activity ([Activity 2b](#)), select one of the categories/lists generated as your target audience.

Target Audience: \_\_\_\_\_

1. List the names of the individuals in your target audience.
2. Brainstorm with team members to identifying what is known about each individual
3. Based on the knowledge you have of the individual, choose the recruiting technique most likely to be successful.

Name	What we Know	Technique

The following individuals will be working to reach this target audience:

The following MRTA members will use these strategies to recruit this target audience:

- 1.
- 2.
- 3.

Timing for this campaign is: \_\_\_\_\_

We will measure success by: \_\_\_\_\_

*Repeat this process for each of your priority audiences. The results, altogether, make up your membership recruitment plan!*

## **Float the Sheetrock and Plaster the Walls Using Meetings and Events to Solidify Recruiting Success**

### Structure your meetings to maximize recruitment:

- ◆ Explore holding meetings at varied times of the week – including weekends – to accommodate the availability of a diverse membership.
- ◆ Have members and guests wear nametags at each meeting.
- ◆ Recognize members' birthdays and anniversaries.
- ◆ Find a meaningful role for each member.
- ◆ Have greeters at each meeting: 2-3 from previous meeting and 2-3 new ones who will repeat at the next meeting.
- ◆ Encourage members to bring guests to meetings.
- ◆ Hold a contest and reward members who bring in the most new members over a specified time.
- ◆ Follow up with guests to encourage their participation.
- ◆ Provide transportation to meetings for members who need that assistance.
- ◆ Find out why people leave your unit and don't renew – and fix what's broken.

**Which of these ideas have you already implemented?**

**Which one will you try next?**

**Which MRTA member(s) will be responsible for the new strategy?**

### Plan activities that appeal to the people you want to attract

Understanding your community's needs and considering the interests and concerns of potential members can go a long way in both recruiting and engaging new members.

Research has shown that people tend to join groups for a range of reasons. Keep these in mind as you recruit:

- |   |   |
|---|---|
| ◆ Someone asked them to join                                      | ◆ For self-improvement                    |
| ◆ To be represented in the legislature; to make their voice heard | ◆ To give something back to the community |
| ◆ To accomplish something they can't do alone                     | ◆ To do something with a purpose          |
| ◆ To meet new people  | ◆ Belief in the organization's cause      |
|   | ◆ To stay active and involved             |

For the Baby Boomers, opportunities to experience new challenges and develop new skills and knowledge are particularly important. Therefore, it will be beneficial to plan creative and meaningful programs for each monthly meeting, including information/education, service, and social/entertainment segments.

See yourselves as others see you. Ask important questions – and be open and objective to the responses you receive:

- Does your group have a sufficiently broad range of programs and volunteer activities to appeal to the variety of retirees in our state today?
- Is your meeting time and place conducive to attracting younger members and those semi-retired?
- Are you featuring top quality speakers? Ask for suggestions from your MRTA State Office, other units/chapters, or representatives of your Chamber of Commerce, college or university, civic and community organizations, and others who can provide information of value to your members and guests.
- Survey members' skills and interests, including volunteer experience. Email a questionnaire. Send a survey in your renewal thank you and your new member packets. Build a database for future project needs.
- Build rapport with area elected and appointed leaders, so they understand the issues facing school retirees and Missouri's education system. Invite them to your meetings. Send them your newsletter.
- Sponsor a field trip to a local museum, theater, or park and have lunch. Check to see if your city will provide free transportation to these events for seniors.
- Volunteer at a hospital or senior center, or volunteer as a group at your community food bank or shelter. Wear logo t-shirts or bring a logo banner or poster.
- Provide examples of healthy behavior: Start a walking club, T'ai Chi group, or a choral group.
- Brand your activities with your state and/or unit logo. Use your elevator statement. Make sure every activity ties back directly to the purpose of the organization.

Check off items on the list above that you are already doing.  
If none, why not? If so, what next?

## Use each meeting, program or presentation as a tool for recruitment

With a little planning in advance, every program and activity our association offers can also serve to recruit new members. You'll notice that the "techniques ladder" showed a 15-30% response rate for new members attending an event with leaders or someone they know. A meeting, training, or special presentation gives the chance for you to tell about the importance of MRTA. And it gives you a chance to ask specifically for membership.

### Tips for membership recruiting at events

- Set up a membership recruitment table at every event and staff with friendly members.
- Circulate a sign-up sheet to collect contact information, especially email.
- Have information available on current events and your association's successes.
- Have information available for people to take home, such as calendars of upcoming events or current opportunities to volunteer.
- Give every prospect a membership form or envelope – and ask them to join!
- Make sure your board members, and other key leaders always have membership forms, brochures, or response envelopes with them.
- Have a standard sign-in sheet at every event. Collect phone numbers and emails, as well as addresses, so you can contact prospects quickly and easily and keep your records up to date. Fill in the top line on the form; no one wants to be first!
- Charge more for non-members than members. This reinforces the value of membership and encourages prospects to pay a bit more and join.
- Follow-up with visitors. Send a note with an invitation to join. Call or send an email inviting them to come to your next event.
- Consider allowing members to join/renew for a two-year period rather than just a one-year period (you will save on postage for renewal mailings!)
- Ask prospects to join. Ask them again. Repeat often!

## Activity 5: Upcoming Events

Our goal is to leverage any events involving MRTA to also recruit new members. Take a moment to review your existing calendar of events, as well to brainstorm *potential* events that could include a presentation about the value of belonging to MRTA. As you create your list, also note any steps that could be taken to help publicize the event so that you can reach more prospective members.

### Current Events

Event Type	Existing/Potential	MRTA Contact	Publicity Ideas?

### Future Events

Event Type	Existing/Potential	MRTA Contact	Publicity Ideas?

## **Feather Your Nest Involve Everyone in Keeping it Beautiful**

### **Engage Your Members to Build Power Together**

When you involve members in the important work of our association, you help them experience firsthand how valuable our group is. Engagement helps our organization by showing political power, demonstrating a constituency, providing service, and increasing visibility.

Engagement helps the member by helping them gain experience, make a difference on issues they care about, learn useful information, meet interesting people, and have fun.

**Brainstorm:**

What are the top issues in MRTA?

### **Engage Members to Have Fun Together!**

Most people stay involved in an organization not only because they care about the cause, but because they like the people and have a good time. An important job of your Membership Committee is to make sure new members, *especially*, feel comfortable and welcomed quickly. You may only get one chance to convince someone to become involved. Here are some ideas:

- Seat new members with Board members or other leaders at their first meeting. Invite them to take a next step like coming to the next meeting or signing up for a committee.
- Celebrate your accomplishments. Have a “The Session’s Finally Over” Party. Go out for a beer together after Lobby Day.
- Send around a survey asking members what kind of events they would like you to host. There might be interest in a book club, bike group, or movie night.

#### **Activity 6: MRTA members just want to have fun!**

- Individual work
- Table Work
- Feedback to Group
- Which do you think are most appealing to new prospective members?

## Engage Members to Volunteer Together

***More than 60% of people over 50 volunteered when asked!!***

Retirees today are charting some new ground in how they want to volunteer. They are seeking to learn new skills, face new challenges, and gain new experience while they give back to the community. And they are looking for options. The group that understands these needs can supply the means of fulfilling them.

Here are 10 things to remember in getting your new members involved in activities:

- 1. Identify volunteer opportunities that complement the MRTA mission.** These could include Lobby Day, voter registration, speakers bureau, tutoring, fundraising events, teacher assistance, and more. Then, survey your members on their volunteer interest areas. Concentrate on two or three projects that make best use of your members' talents and relate to your core mission.
- 2. Just ask.** Most people are willing to volunteer, but have never been asked to do so. And remember, flyers and bulletins are helpful, but there's no substitute for person-to-person contact.
- 3. Plan the work.** Make sure you have immediate work to do, if you are asking for volunteers. There are few things worse than offering your time, and never being contacted. Whatever your volunteer activity, be sure to know what needs doing and have something for every volunteer to do. Having too many volunteers on hand is never a good thing.
- 4. Make the connection.** Be sure your volunteers know the big picture of what the day's project is all about – how it benefits the community and how it connects to the overall strategies of your state and local association.
- 5. Provide training and tools** to accomplish the task. If possible, target the skills needed when recruiting for the project. If special skills are needed, consider holding a volunteer training session.
- 6. Add variety** to your volunteer programming. Ongoing projects or those that require three Saturdays to complete are not always attractive in today's time-conscious world. Balance out your activities with ways members can contribute just three hours or by volunteering just one day. Boomers, in particular, want flexibility that allows them to integrate paid and unpaid work.
- 7. Make it a family event.** Design projects and activities that family members can do together. Volunteer time is quality time!

8. **Look for leaders...** and let them lead. Think of it as “good followship.” Today’s volunteer could be tomorrow’s project leader and tomorrow’s project leader could be a future unit president or board member. Nurture these members and cultivate future unit success.
9. **Develop partnerships.** Combining resources with other community organizations can increase your ability to accomplish bigger things. Visible partnerships can also help build advocacy alliances. Other MRTA units make good partners, too!
10. **Take it on the road.** People like to travel. People like to volunteer. Look for opportunities to combine the service and fellowship sides of unit/chapter life.

Of course, remember to thank your volunteers and recognize their efforts first, last, and foremost. Ask for their feedback on the project: What worked well? What might we do better next time?

**And have fun!** Whether you are recruiting new members or engaging them in chapter activities, show your enthusiasm about the unit and the volunteer opportunities it offers. If you’re excited about MRTA, your MRTA unit and serving the community, people will want to join you – and vice versa!

## **Keep the Home Fires Burning! Five Strategies for Renewing Members**

The most common reason people give for not renewing their membership is “I think I’m still a member.” Usually, the group has not reminded them often enough – or invited them to renew frequently enough – to make sure it happens. Here are some tips on ways to make sure most of our members renew.

### **1. Mail Each Member at Least Three Renewal Notices.**

- ◆ Mail the first one two months before the membership expiration date. This gives plenty of time for the mail to arrive, the member to write the check, and the postal service to return it to you. You will receive the highest percentage response to the first renewal notice.
- ◆ Mail the second notice the month their membership expires. This two-month gap makes sure you have caught as many people off the first notice as possible.
- ◆ Mail the third notice two months after the expiration date.

## **2. Make it Easy for Members to Respond.**

Be sure to include a response form and pre-addressed envelope or a remit envelope (“contribulope”) with your renewal request. If you have a website, allow members to renew (and new members to join!) on line.

## **3. Use Email for Renewal Reminders.**

Most people prefer to mail back their renewal dues. However, you can use email to send out a message the day you post the notices saying something like, “Thank you for your past support of the Missouri Association of Retired Teachers and School Personnel. Your membership is now up for renewal. I’ve just mailed you a reminder and return envelope. I look forward to hearing from you soon. And I look forward to seeing you at our [next meeting/event] on [date] at [place].”

## **4. Send a Hand-addressed Fourth Notice.**

If a member still hasn’t renewed after three notices, send her or him a fourth notice in a hand-addressed envelope, mailed first class. This will increase the chances that the member will open the envelope. Consider adding a hand-written note on the letter or renewal form (“We miss you! The Legislature goes back into session next month. Please renew today.”)

## **5. Telephone Non-renewals.**

If a member still hasn’t renewed after four notices, give her or him a call. If the call can come from someone known, that’s even better. If the answer is “no,” see if you can find out why they are not interested in renewing.

## **Reward, Celebrate and Appreciate**

Members are the lifeblood of an organization. They are also the face and the voice of an organization. Make sure they know you appreciate them. And make sure the public knows what a great membership you have!

### **Thank Before You Bank.**

Studies have shown that the speed of the acknowledgement is more important than who sends it. Make sure you have a process for quickly thanking new and renewing members for their donation. Get a letter out within a couple of days or, at the most, a week. You want to make sure members get appreciated before they see their check cashed on their bank statement!

### **Call and Thank New Members.**

Assign Membership Committee members or board members to call new members in their area. They can invite them to come to the next meeting or event. In most cases, the caller will get an answering machine. Leave a message with your name and number. Connecting a voice with the organization is a powerful way of personalizing the importance of each member.

### **Recognize Member Accomplishments.**

Highlight members in the newsletter and on your website. Applaud accomplishments at meetings or events. Thank the volunteers involved in planning a meeting or event. Take photos of members with well-known speakers and send the photo with a brief caption to the local press.

### **Set Your Priorities.**

This workbook includes many ways you can build our membership. Your next step is to look at what you have been doing, identify what is working best, drop things that are not effective (if any), and choose the ideas above that fit best with your program goals and objectives.

Next, set a reasonable schedule for adding new activities to your list. You do not have to do it all at once. Delegate some tasks to other Committee members. Put other projects on the calendar for implementation – six months from now.

## **Many Hands Make Light Work**

### **A Word or Two About Membership Committees**

#### **A Word . . .**

Without question our members are the life blood of our organization. They offer so many benefits as volunteers and activists, resources for contacts and influence as well as financial support. They deserve the support of a dedicated group of individuals working on their behalf.

The goals of recruiting, engaging, and retaining members deserve the support and attention of our entire organization. By creating an active local Membership Committee, you are helping to make sure that membership gets the attention it needs and deserves.

You have already identified a number of activities that need to be done to recruit, reward and retain MRTA members. By grouping like activities together and ***getting commitment*** from those who developed the list, you have *de facto* created your membership management team.

#### **. . .or Two**

**Membership Committee duties** include (*but are not necessarily limited to*):

- Preparing a membership plan for recruiting, engaging, and renewing members.
- Welcoming and thanking members.
- Encouraging prospective members to join.
- Renewing current members.
- Maintaining records of current, lapsed, and prospective members.
- Setting goals for achieving membership growth.
- Making sure membership goals are incorporated into all organization activities.
- Incorporating membership recruitment into all events.
- Assuring consistent use of the elevator statement in all communications.
- Developing tactics for making your association more visible to key prospects to help attract them to the association.
- Promoting a culture of inclusiveness, effectiveness, and fun!

Members of the Membership Committee should be chosen because:

- They are enthusiastic about your organization and support its mission.
- They are committed to helping the organization grow.
- They enjoy being around people and are pleasant to be with.
- They communicate effectively with potential new members and can answer questions about the association.
- They are reliable.
- They represent an important audience you are trying to recruit or retain.
- They use email regularly and have access to a computer and the Internet.
- At least one member of the Membership Committee should:
  - ◆ Be proficient at record keeping and database management
  - ◆ Write well
  - ◆ Be willing to serve as Chair
  - ◆ Be responsible to ensure that adequate supplies of recruiting materials are on hand – sign-in sheets, applications, newsletters, giveaways, etc. – and delegate the distribution of these supplies to an appointed member for each appropriate event.

The material in this handbook is based on that written by

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with additional materials adapted from handbooks developed by the  
AARP's Department of Volunteerism