

# ORGANIZING AND CONDUCTING AN AFA MEMBERSHIP DRIVE

## TABLE OF CONTENTS

Introduction. . . . .	1
A. Establish a Goal . . . . .	1
B. Set Your Timetable For the Campaign and Select Key Workers. . . . .	2
1.) When will it occur? . . . . .	2
2.) How long should it last? . . . . .	2
3.) Who will conduct it? . . . . .	2
C. Where To Prospect For New and Renewal Members. . . . .	2
D. Decide on a Kickoff Function. . . . .	3
E. How About Competition? . . . . .	3
F. Suggested Chronology of Events. . . . .	4
<u>Two – Three Months Before the Drive.</u> . . . . .	4
Initial tasks. . . . .	4
Decide on your approach to publicity. . . . .	4
Determine if you have all the promotional materials you will need for the drive. . . . .	4
<u>One – Two Months Before the Drive.</u> . . . . .	5
<u>One Week Before the Drive.</u> . . . . .	7
<u>The Drive Begins.</u> . . . . .	7
<u>First Week.</u> . . . . .	8
<u>Second (and Subsequent) Weeks.</u> . . . . .	8
<u>After the Drive.</u> . . . . .	8
G. Notes About Base Drives. . . . .	9
Support for Professional Military Associations. . . . .	11

## GUIDE II –ORGANIZING AND CONDUCTING AN AFA MEMBERSHIP DRIVE

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### Introduction

This guide provides ideas to help you plan and carry out a successful membership campaign tailored to your specific chapter's needs and resources. Although, the information is written for a highly structured, rather lengthy drive, you can adapt it by just taking the parts that fit your particular situation and customizing them to your needs.

Remember, a membership drive or campaign need not be an elaborate, highly structured affair stretching over many weeks. Many chapters have found it more effective to mount a one-day or one-week "blitz" for new members. The important thing is that no matter how big or little your drive may be, you take time to plan it and organize for success!

Keep in mind that in any membership campaign your Chairperson (coordinator or whatever title you choose) and your campaign workers should represent both AFA AND the people they will be approaching as prospective members. As a minimum and as basic as it may sound, be sure everyone working on your campaign is a member (or patron)!

This guide may be used for conducting membership drives either in a civilian community, *or on a military installation (base drive)*. *Since base drives differ from off-base membership drives, all notes relating specifically to base drives will be in italics.*

In the very earliest stages of the membership drive, the chapter(s) will make key decisions that set the parameters of their efforts. One of those tasks is to determine their membership goal.

#### A. Establish a Goal

Define a measurable, realistic achievable goal. Without that, no membership campaign will succeed.

Set a specific goal for this particular campaign - not for the entire year's effort.

Examples include...

A 10% increase in Community Partners

Exceed last year's total membership of \_\_\_\_, by \_\_\_\_.

Achieve quarterly new member goal of \_\_\_\_.

Qualify for \_\_\_\_\_ (AFA National Award) by \_\_\_\_\_.

## B. Set Your Timetable For the Campaign and Select Key Workers

Answer three questions before you launch your campaign.

1.) When will it occur? You need to know the dates of the drive early so you can allow for plenty of time in advance to prepare. It is easy to underestimate this requirement. You should plan at least two months in advance of the drive. Also, remember to check your dates against other schedules for potential conflicts. Will summer mean that many of your prospective new members are on vacation and miss the drive completely? Pick a definite, but limited (4 – 6 week) period when you will be able to devote time and energy to the process. *For most, the traditional March through May time will likely be the best on a military installation, and interfere least with other Air Force activities (Combined Federal Campaign, US Savings Bond Drive, and Air Force Assistance Fund Campaign).*

2.) How long should it last? *A six-week period works well with a large population such as that on a major Air Force base. If that is too long, pick a period that will be convenient to you.* The bottom line is to have the drive and to allow enough time to contact 100% of the people in your target group.

3.) Who will conduct it? Here's the real key. You'll need a Chairperson and a committee to plan and set up the drive. The primary consideration for the Chairperson and committee is that they have the time and ability to get the job done. *For base drives, the Chairperson may be a "blue suiter," but think that through. A co-chair arrangement with military and civilian may work best.* Then you may need a larger group to actually make the face-to-face contacts. In choosing people, remember to look for those who have enthusiasm and the ability to work well with others. Check to make sure they are AFA members or patrons and that they are prepared to talk about the Association. Use their names in your public releases and encourage them to become real focal points for information about AFA. *For base drives, make sure they represent all parts of the Air Force family appropriate to the base – officer, enlisted, and civilian.* Establish an electronic email address listing of all members of your committee. This is critical in order to keep in touch with the volunteers.

## C. Where To Prospect For New and Renewal Members

Part and parcel of your planning for a membership campaign – and indeed in setting a goal – is to define the target group for the campaign. If you do not do this it's like going to a gunnery competition without targets. How will you know where to aim or if you hit anything? Ok, where will you aim? Will private business be the major target group? How about civic organizations like the Lions Club, or public service groups like the police or fire departments in your community?

*For many years it has been a simple matter to say “the base.” But even the local base is made up of different tenant organizations, working for different commanders. So you must be specific even there. List specific organizations or directorates where you’ll focus your efforts. Target lists will guide your selection of campaign workers and/or your efforts to seek volunteer organizational points-of-contact (POCs).*

- Previous members
- People with Air Force or other military service
- Educators familiar with the Visions program
- Community leaders
- Businesses (potential Community Partners)
- ROTC, JROTC, or CAP cadets/sponsors/instructors
- Military retirees
- ...and so on. Use your imagination!

This list then offers you specific people to talk with – and to revisit if they seem interested but aren’t yet ready to join. It’s a good idea to identify a point of contact for each group of target organizations.

#### D. Decide on a Kickoff Function

You may want to plan on some sort of kickoff function to help build worker enthusiasm and commitment. You know your volunteers. Consider what sort of event would help them most.

- Formal or informal breakfast/luncheon/dinner meeting with a talk about AFA from a prominent AFA leader.

- Casual get-together – with food and refreshments – to pass out campaign materials, conduct training, and answer any last-minute questions.

- Add you own here...

#### E. How About Competition?

Developing a healthy spirit of rivalry among campaign workers or between teams of workers can help you organize a successful drive. It may help to break your overall goal into individual or team goals with prizes for the winners. You may be able to get one of your Community Partners to provide the incentive. Each volunteer earns a number of chances to win the incentive with additional chances for each new member signed up. Each new member earns a chance at the incentive. You set the exact rules. Highlight the incentive in the pre-drive publicity campaign. Announce the winner at the end of the drive and use it as a photo opportunity for local newspapers *and the base paper*. Be sure, however, that you set up a system where you can measure results and give proper credit

to your volunteers and those that contribute to your campaign.

#### F. Suggested Chronology of Events

As discussed previously, most successful membership drives concentrate on a short, precisely defined period of time. Use the following time line as a general framework to help you with your preparation and planning.

##### Two – Three Months Before the Drive

Initial tasks. As mentioned above, the chapter(s) that sponsor the membership drive have accomplished a number of initial tasks to include establishing a goal, setting the length and dates for the drive, selecting a Chairperson and committee, determining target groups, selected a kickoff function, and determined if there will be competition and awards for the volunteers. If any of these steps are not complete, accomplish them now.

Decide on your approach to publicity. Consider bulletins, newsletters, and local news media.

Announce the names of the AFA representatives and/or organizational POCs, dates for the drive, and dates and locations for presentations by AFA chapter leaders, if appropriate.

Also, include information about local chapter activities. Consider using the AFA video is appropriate.

Sample announcements can be found in AFA Membership Resource Guide IV.

*A good relationship with the base Public Affairs Office will help here. You should be able to place articles in the base newspaper and announcements in the bulletin. If your base has a closed circuit TV, see if they would be interested in running the AFA video. Set up a schedule for these activities.*

Determine if you have all the promotional materials you will need for the drive.

Estimate your requirements for membership brochures, posters and easel displays, *What's In It For Me Leaflets*, and AFA videos. ORDER THE MATERIALS from National. Contact AFA's Manager of Membership Programs at 1-800-727-3337, ext 4891.

The membership application is attached to an explanatory brochure that describes, in very brief detail, some of the activities of the Air Force Association. You will

find a downloadable membership application on AFA's web site under Field Resources/Library/Forms. There is also one included in AFA Membership Resource Guide IV.

Use posters on bulletin boards as visual reminders of the drive...and the continuing value of AFA membership.

Vinyl-laminated posters are designed for counter, desk or tabletop displays. The built-in pocket for membership brochures and the pop-out easel stand make them particularly useful in high traffic areas.

*What's In It For Me* leaflets provide information on how AFA is working for the Air Force and its active duty, Reserve, and Guard officers and enlisted, civilians, veterans/retirees, and cadets by listing concerns, benefits, national programs, and events of interest. There's also a "What's In It For Me" leaflet for Community Partners. All *What's In It For Me* leaflets can be found on the AFA web site [www.afa.org](http://www.afa.org).

A variety of videos about the AFA are available from National.

Materials received from National are great aids to assisting volunteers in getting the word out about the AFA. However, National materials contain nothing about your chapter(s) in terms of what they do to support the AFA and the Air Force family. If you don't have printed material about your programs, it's time to put it on paper. That material will then be a major part of your membership drive.

On an optional basis, pamphlets on AFA's Group Insurance programs are also available. An outline of the various programs available to AFA members is provided on AFA's Web site [www.afa.org](http://www.afa.org) under AFA's Members Area. A supply of pamphlets on any of these programs will be sent upon request, if available.

Along with promotional materials, the chapter will need to purchase administrative supplies (pocket folders, paper, clips, rubber bands, discs, and a chapter stamp). These supplies are needed to build packages to distribute the promotional materials to the volunteers.

Plan a "stamping party" to be sure your chapter number is on each application so you will get credit for those new members you recruit. Consider including your chapter's web address on your chapter stamp(s).

### One – Two Months Before the Drive

Mobilize your workers. Remember to make a formal list with phone numbers, email and

home addresses (so you can keep in touch and thank them later). The success of the drive will depend not on how many people agreed to work but how many actually make the contacts they've agreed to. Be sure to plan for replacements and alternates.

Be sure to check that your volunteer workers are prepared with information on AFA so that they can do a good job of "selling" the Association, that they have applications and that they know who to contact if they have questions they can't answer. Be sure to check that they are actually making the contacts.

How many volunteer workers do you need? That's best determined by the size of your target audience or the number of people you plan to contact. Also, the time you've set aside for the drive is key. Experience shows that it's wise to have enough volunteers so that each will only have to contact a few prospects. You'll find it easier to get volunteers if they know they won't be overwhelmed by the job and can expect to complete it in a reasonable time.

You may want to consider a "leave behind" note to go along with the membership application. The note should tell the prospect the name of the volunteer and list the actions you've decided on as appropriate to your drive. For example...

Ask them to contact the volunteer (or the chairperson) if they are interested in joining...

Tell them the volunteer will stop by again to follow up on the initial contact...

If they're a member, ask them to give the application to a coworker who might be interested...

Whatever fits where you are... .

*Contact the installation or host commander for support and be sure to take a copy of the Chief of Staff's Memo and the Support For Professional Military Associations (PMAs) Fact Sheet with you. Tell the commander how the drive will be conducted. Provide the commander a memo for his/her signature that announces the drive and chairperson and encourages unit commanders to allow volunteers within their units to assist the chairperson as organizational POCs. Finally, the memo lists the chairperson's and chapter officers' contact information. Ask the commander to distribute the letter on base. Workload permitting, consider contacting other tenant organization commanders. You will find the memo, fact sheet, and an example commander's memo in Membership Resource Guide IV, "Samples and other Good Stuff".*

*Also, if the base hasn't appointed an official liaison for the AFA chapter, ask for one to be appointed. The liaison can be helpful in keeping the lines of communication open*

*between the base's senior leadership and the chapter.*

*The commander can do a great deal to help your drive so long as he/she is able to act in an unofficial capacity as outlined in the "Support For PMAs Fact Sheet." Be aware of the constraints on their actions and above all, don't demand anything.*

Recheck that the materials you ordered have arrived, and that you have what you need.

### One Week Before the Drive

Hold a meeting of the Organizing Committee and of your volunteer workers.

Review campaign goals and objectives. A useful Briefing Outline for this meeting can be found in AFA Membership Resource Guide IV, "Samples and Other Good Stuff".

Distribute promotional material to all volunteers. Review the rules. Arrange to get the information to those volunteers who couldn't be at this meeting.

Ask your volunteers to verify that your chapter is marked on each application form so the chapter will get the credit for the new members.

Emphasize that no cash payment should be sent in with membership applications. Payments should be made by check or charged to VISA, Master Card, or American Express Accounts.

Review your publicity efforts initiated earlier. Determine what type of media you will use now that the drive is close at hand.

### The Drive Begins

Be sure that you and all of your committee and volunteers actually get out and make the contacts. This is where your efforts pay off and is the only way you will recruit new members.

Be persistent so that each prospect is contacted and follow-up visits are made where warranted.

If you have a large drive, republicize as necessary. Consider using gatherings of prospects where an AFA volunteer might show a video, be ready to answer questions and make membership materials available to attendees. The chapter may consider sponsoring light refreshments (coffee, cookies, etc.).

This form of presentation is particularly effective when held on the first day (or week) of the drive. Follow-up showings during both the second and third weeks of the drive will also prove to be very useful – provided good, advance publicity is given for each presentation.

Continue announcements in bulletins/local newspapers. Articles need not be long, but a daily or weekly count of results can keep interest in the drive going among current members and new members. It may also attract those who have not yet joined. Additionally, it is useful to again publish the names of each volunteer worker and organizational POCs to serve as contacts. Samples can be found in AFA Membership Resource Guide IV.

### First Week

Hold progress meetings with your Organizing Committee to review accomplishments and exchange successful ideas. When difficulties arise, try to solve them at the lowest level possible *or discuss them with the base's official liaison*. But do let the drive chair know *and above all, keep the commander informed* of the news – both good and bad – as the drive continues.

Assure that all applications received by the chapter to date have been sent to National. Nothing is more disturbing to a new member than not to receive his or her member credentials and the first issue of Air Force Magazine within a reasonable period of time (2 – 3 weeks). But AFA National can't do its part when it doesn't have the applications in hand.

Arrange for follow-up publicity. Samples can be found in AFA Membership Resource Guide V.

### Second (and Subsequent) Weeks

Repeat the First Week's actions as required.

### After the Drive

What you do after the campaign is over is critical to your credibility and your ability to continue to conduct membership drives.

First, second, and third in importance (it's impossible to overstate the case) is to thank each and every volunteer who helped. **THANK EVERYONE!** This includes your campaign workers and anyone else who contributed in any capacity. *Make sure you include the Commander and the base Public Affairs Office.* Nothing can "sour" people more quickly than not being thanked for their contribution, regardless of its size. Write or phone them as a minimum. If a formal thank-you will help with the person's

boss, write one. You may also plan some sort of social event to cap off your drive as well.

Then plan to build on your success and to keep the AFA name and logo in sight. Continue to keep copies of the AFA membership application available on a regular basis at various locations.

Finally, make a record of what you did and put that, together with copies of everything you used, in one place so that the next organizer can take advantage of what you have done. Survey your committee and volunteers to include what worked and what didn't and any ideas you have of what to do better next time. And when you consider what to save – save it all. This includes meeting agendas, minutes, rosters of workers, notices, press releases, bulletins, signs, brochures – anything that might be remotely useful to the next person.

Compile and publish your results. Include results from each volunteer if appropriate. If you have any suggestions for this guide, send them to the Air Force Association National Headquarters. You are on the front lines and your analysis is very helpful to the Association. AFA wants to know what went right and what went wrong, as well as recommendations for improving results and increasing the attractiveness of AFA membership.

#### G. Notes About Base Drives

For many years the terms “membership drive” and “base drive” were synonymous for AFA. That can no longer be the case and it is important to consider the impact of some significant changes with respect to membership drives on military bases, which occurred in 1994.

From its beginnings in the early 1970's, the annual AFA on-base drive had been largely an Air Force-conducted operation. While some local chapters assisted greatly, others did not involve themselves at all. However, both AFA (and AFA's chapters after automatic affiliation) benefited greatly from large numbers of new members recruited in this way. The 1993 DOD Ethics Regulation has changed matters considerably. It permits membership drives to take place but, among other things, restricts official Air Force participation compared with previous years.

Put very simply, due to changes in governing DOD directives, membership drives on Air Force bases will be initiated by and conducted by AFA chapters or they will not take place. Said another way, a drive among military (active, Reserve, and Guard) personnel and DOD civilians on military bases can take place; but, in contrast to past years, the Air Force will NOT organize and conduct it. This is now the chapters' responsibility.

AFA needs to continue to recruit service members, and if your chapter is near a base they are an important part of your membership as well. So, it is vitally important for you to do some serious planning for a membership drive focused on active duty, Reserve, and Guard personnel as well as DOD civilians. Also, make this plan a major element of your annual membership plan.

The Department of Defense (DOD) Joint Ethics Regulation was published 30 August 1993 and applies to the Air Force and other military services. It defines permissible participation by Air Force and DOD personnel in membership drives such as AFA's. Briefly, the new document brought together in one regulation provisions that were previously stated or implied in a number of Air Force instructions and DOD directives. Thus, the "new" regulation contains many provisions that have been there for many years.

However, one thing is new. There is now specific language in a section on "Fundraising and Membership Drives" and there is an explicit statement that "DOD Components shall not officially support and DOD employees shall not officially endorse or officially participate in membership drives...for any non-Federal entity." The statement is new, but the legal folks tell us this has always been implied by the previous regulations.

Many people have interpreted this language to mean that Air Force people can't participate in the base drive at all. This just simply isn't true. The following fact sheet issued by the Air Force Chief of Staff highlights the support that can be provided.

## SUPPORT FOR PROFESSIONAL MILITARY ASSOCIATIONS

**While the Air Force cannot endorse or sanction professional military associations (PMAs) under the Joint Ethics Regulation (JER) (DoD 5500.7-R), commanders can provide other types of support. JER 3-209.**

PMAs include such organizations as the Air Force Association, Air Force Sergeants Association, The Retired Officer Association, the Reserve Officer's Association, and other similar organizations that exist to promote the development of military professionals.

The following information highlights the support that can be provided to PMAs. This fact sheet is not a substitute for legal guidance. Decisions on requests from PMAs should be made on a case-by-case basis with the assistance of the staff judge advocate.

### Distribution of PMA Information

- Commanders can publish news items on PMAs, including current activities and membership drives. Note, however, that similar groups merit similar treatment – a commander cannot pick and choose which PMAs to publicize. JER 3-208.
- Commanders can issue informative memos on the existence of PMAs and can announce their membership/fundraising drives. Pursuant to DoD/GC guidance, when referring to membership/fundraising activities, commanders need to remain neutral and detached. Informative memos should avoid the use of certain words (including “endorse,” “support,” “encourage,” “recommend,” and “urge”). DoD/GC Memo, *Endorsement vs. Information Memoranda*, 28 May 96.
- Commanders can issue official letters thanking PMAs for support of the Air Force community. These letters can be disseminated through official channels. See SECDEF Memo, *DoD Support of the Armed Services YMCA*, 8 May 97.
- Commanders can permit PMAs to post notices of special events on bulletin boards and television or radio programs in the same way other organizational information is disseminated. However, unless the base has an E-mail bulletin board set up for non-official postings, commanders should avoid using official E-mail systems to disseminate information to PMA or other private organization activities. JER 2-301.a. (2)(e); AFI 33-119, *E-Mail Management and Use*, para. 3.3.2.5.

Commanders can permit PMAs to set out membership applications, leaflets, or flyers in a common area of the base, as long as similar groups are given the same privilege. JER 3-211.a.

- Commanders can encourage members to participate in PMAs in general.
- When publicizing PMA membership drives, the commander can publicize the name of the AF member who has *volunteered* to be a point of contact for new members. The commander may not, however, appoint a member to do this, nor may the member act as a PMA representative in an official capacity. JER 3-210.

### Support for PMA Activities

- Commanders can appoint an official liaison to act as a base representative to the local PMA chapter. The liaison performs official duties in representing AF interests to the PMA. The liaison cannot become involved in PMA management. JER 3-201.a.
- Commanders can support PMA breakfasts, luncheons, and dinners by publicizing these events and providing speakers or panel members. The JER also allows commanders to allow AF members and employees excused absences for “reasonable periods of time” to voluntarily attend these types of activities. JER 3-211; 3-300.b.
- Commanders may permit members and employees to use government equipment and administrative support to prepare papers to be presented at an PMA event (i.e., conferences, seminars, or similar events) if: (1) the paper is related to the employee’s official duties, (2) the AF can derive some benefit from such participation, and (3) the support does not interfere with official duties. JER 3-300.b.
- Commanders can provide logistical support of PMA-sponsored events, such as conferences and seminars (except for fundraising and membership drives) if: (1) the support does not interfere with official duties; (2) legitimate AF interests are served; (3) it is appropriate to associate the AF with the event; (4) the event is of interest to the AF; (5) the AF is able and willing to provide the same support to similar events; (6) the support is not prohibited by other statutes; and (7) on admission fee (beyond covering reasonable costs) is charged. JER 3-211.a.
- Commanders can provide limited logistical support for PMA-sponsored charitable fundraisers when items (1) through (6), above, are met and the fundraiser will take place away from the Federal workplace. JER 3-211.b.

Commanders can lead by example by joining one or several PMAs in their personal capacity. JER 3-300.