



Retaining Chapter Members Checklist

WARNING

Member retention is essential to chapter survival. Failure to retain chapter members once you've recruited them can lead to a chapter becoming ineffective or closing. New members bring new ideas and enthusiasm. Some will become chapter leaders but only if the chapter retains them.

I. Before starting retention efforts

1. Identify people and other resources available for the effort
 - a. Specific jobs you need to fill
 - b. Specific expertise you need for a given task or project
2. Set your chapter's retention rate goal
 - a. Start from existing data, if available
 - b. Make the goal reasonable given your available resources
3. Assign specific tasks
 - a. Base on individuals' skills, time available, interests

II. Develop your general new member retention plan

NOTE

Starting from the information above, WRITE THE PLAN DOWN. This plan will need to be tuned to the individual needs of each member you are seeking to retain.

CAUTION

The first 90 days of a new member's membership are the most critical for their future retention. Failure to engage with them within this period creates the greatest risk that they will not renew their membership.

1. The first 90 days
 - a. The first 30 days
 - i. Identify your new members
 1. Chapter update roster will list them
 - ii. Welcome them to the chapter
 1. Chapter President or Membership VP: send personalized letter or e-mail or call the new member
 - a. Use word processor's mail-merge or similar function if there are many new members to contact
 2. Announce their membership via social media and in chapter newsletter

NOTE

When calling a new member, these are good topics to discuss: why they joined; what they are interested in; how the chapter can fit those interests; "The Promise" that they will be asked to do only ONE thing during the year. If they want to do more, it will be their choice, and they can refuse requests to do more from the chapter. Focus on the new member's interests and needs, NOT the chapter's.

CAUTION

Topics to avoid in this initial phone call: requests to take on big jobs, like a chapter vice president position; partisan politics; problems the chapter may be experiencing. These topics risk alienating the new member, or making a bad impression on them.

- iii. Get the new member involved in some chapter activity

NOTE

Meeting attendance DOES NOT count as getting a member involved. Your goal is active participation, even if in some minor way, with something the chapter is doing.

- b. The next 60 days
 - i. If the member has not participated in any chapter activities, contact them to:
 1. Find out why
 2. Offer assistance that would enable them to participate, if possible/appropriate

CAUTION

DO NOT pressure a new member to participate. This is more likely to drive them away than to motivate them to become involved.

- c. Also within the first 90 days
 - i. Introduce them at a chapter meeting, if they're in attendance

2. The middle six months
 - a. If the member is still not participating, contact them to:
 - i. Find out why
 - ii. Offer assistance that would enable them to participate, if possible/appropriate
 - b. If the member IS participating
 - i. Show your appreciation by:
 1. Offering personal thanks
 2. Mentioning any special contribution they've made
 - a. On social media and/or in the chapter newsletter
 - b. At a chapter meeting
 3. Keep "The Promise" by NOT asking them to take on additional responsibilities

NOTE

Personal thanks can do more to motivate a new member to renew their membership than almost any other kind of reward. A simple "thank you for helping out" is often sufficient.

3. The last 90 days
 - a. Identify members coming up for renewal within the next 90 days
 - b. Augment National's renewal reminders sent by with chapter-initiated, personalized ones
 - i. Letters and/or e-mails
 1. Use mail-merge or similar tools to automate the task, especially if there are many reminders to send out
 - ii. Private reminder on social media
 - iii. Reminder notice in chapter newsletter
4. The last 30 days
 - a. If the member has not renewed
 - i. Make a personal phone call
 - ii. Send a personalized letter or e-mail
 - iii. Send a private social media message
5. After the member's expiration date
 - a. If the member has failed to renew, seek to find out why through a personal phone call or other contact
 - b. Place a reminder in the chapter newsletter

CAUTION

If a member chooses not to renew, DO NOT criticize them or beg them to renew. Instead, seek constructive feedback on why they made their decision and be gracious regarding any they provide.

6. After the member renews
 - a. Show your appreciation through:
 - i. A personal thank-you letter or e-mail
 - ii. A social media post
 - iii. A mention in the chapter newsletter

- iv. A mention at a chapter meeting
 - b. If the renewal marks a special anniversary (e.g. 5th, 10th, 25th, or higher year of membership), repeat step 6a above but with greater emphasis
7. Special situations
- a. Members moving in from outside of the chapter's area
 - i. Follow the steps outlined in II.1.a. above.
 - b. A member fails to renew and does not respond to contact attempts
 - i. Check the chapter update roster
 - 1. Changed chapter affiliation?
 - 2. Died?
 - 3. More than six months past expiration date?
 - ii. If no information in update roster
 - 1. Used last-known contact information to try to re-establish contact
 - 2. Check online obituaries

III. Personalize the plan

- 1. Using the steps outlined in Part II of this checklist and any information the new member provides, personalize the plan to make it specific to the interests and special situation of that member.

NOTE

This personalized plan does not have to be written down, but it is helpful to capture in some form what the contact person learns about the new member in order to make future retention efforts more effective.

IV. Evaluate retention efforts and results

- 1. At each chapter Executive Committee meeting
 - a. Review new members
 - i. Number
 - ii. Contact person
 - iii. Whether contact has been made, and results
 - iv. Actions remaining to be taken
 - b. Review upcoming and past-due renewals
 - i. Identify those needing the most attention
 - ii. Review actions taken so far, if any
 - iii. Identify who will do what for each
 - c. Review renewals accomplished
 - i. When done, relative to renewal date
 - ii. Compare actual renewal rate to annual goal
 - iii. Identify any steps needed to improve renewal performance and who will take them

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