

# **Sample Membership Recruitment/Retention Plans**

## **Sample for Chapters with 15-50 Members** **AFP West Texas Southern New Mexico Chapter** **Membership Recruitment and Retention Plan** **January 1 – December 31, 2008**

### **1.) Background**

#### ***Chapter Name:***

Association of Fundraising Professionals – West Texas Southern  
New Mexico Chapter

#### ***2008 VP for Membership:***

Mark Matthys  
American Red Cross El Paso  
3620 Admiral Street  
El Paso, TX 79925  
915-592-0208 x222 Office  
915-433-9553 Mobile

### **2.) Membership Committee Structure**

The Membership Committee will cover target areas of Recruitment, Retention, Marketing.

### **3.) Membership Recruitment Goals**

AFP West TX Southern NM has averaged a 71% renewal rate the past three years but, net membership has declined by 1% during the same period. The chapter signs 11 new members per year on average. In the first two months of 2008 we already have 4 new members. Our plan is to balance recruitment and retention, while improving marketing.

*The retention goal for 2008 will be to retain 75% existing members*  
*The recruitment goal for 2008 will be to recruit 12 new members*

#### 4.) **Overall Objectives & Key Action Steps:**

##### **Attract and retain an ever-growing, engaged, more diverse membership base.**

1. Increase net membership 10% by December 31, 2008 (*Recruitment*).
2. Increase retention rate to 75% (*Retention*).
3. Increase awareness of member benefits (AFP Code of Ethics, CFRE, web resources) (*Marketing*).

##### **Membership Structure**

- 4 AFP members now serve on the Membership Committee, drawn from the officers and executive committee.
- By June 1, 2008, develop and distribute membership committee assignments to engage existing members in participation.

##### **Recruitment**

- Conduct outreach to NMSU and other primary nonprofits in Southern New Mexico
- Emphasize relationships with major El Paso groups who are not well represented, such as United Way, Community Foundation, Nonprofit Enterprise Center and UTEP Center for Civic Engagement.
- Provide seat sheets or informational packets at all audio conferences, Philanthropy Day, scheduled workshops and other events which prospects may attend.
- Contact boards and executives of local nonprofits with the intention of promoting AFP membership

##### **Retention**

- Collaborate with Mentor Program to ensure member participation.
- Offer and promote participation in Philanthropy Day and scheduled workshops
- Offer and promote participation in the Annual Meeting/Holiday Party (December 2008).

- Continue to contact **all** new members with a welcome and list local chapter contacts and event dates
- Emphasize Return on Investment of membership

### **Marketing**

- Emphasize Philanthropy Day as a spotlight event for prospective members
- Continue to provide new member information to the chapter newsletter and distribute email communications related to upcoming events.
- Promote awareness of philanthropy through development and dissemination of press releases; speaking to local groups, etc.
- Implement value proposition mailings and emails to targeted prospects

**Sample for Chapters with 51-100 Members**  
**AFP Monterey Bay Chapter**  
**Membership Recruitment and Retention Plan**  
**January 1 – December 31, 2008**

**5.) Background**

***Chapter Name:***

Association of Fundraising Professionals – Monterey Bay Chapter

***2008 VP for Membership:***

Catherine Lindstrom

Foundation for Monterey County Free Libraries

450 Lincoln Ave. Ste 203

Salinas, Ca. 93901

831-424-3564

**6.) Membership Committee Structure**

The Membership Committee will cover target areas of Recruitment, Retention, Marketing.

**7.) Membership Recruitment Goals**

AFP Monterey Bay Chapter exceeded its target goal of 7 new members by gaining 13 new members in 2007. On the other hand we had several non-renewals. In the first month of 2008 we already have 3 new members. Retention will be our key goal.

*The retention goal for 2008 will be to 95%*

*The recruitment goal for 2008 will be to 8 new members*

**8.) Overall Objectives & Key Action Steps:**

4. Increase net membership 13% by December 31, 2008 (*Recruitment*).
5. Increase retention rate to 95% (*Retention*).
6. Increase awareness of member benefits (AFP Code of Ethics, CFRE, web resources) (*Marketing*).

## **Membership Structure**

- 4 AFP members now serve on the Membership Committee, we have the intention of developing a member to shadow membership chair and serve in that capacity for 2009.
- By March 1, 2008, develop and distribute membership committee assignments to engage existing members in participation.

## **Recruitment**

- Schedule and offer two prospective member meetings.
- Provide informational packets at all audio conferences, Fundraising Day, scheduled workshops and other events which prospects may attend.
- Contact local non profits with the intention of promoting AFP membership

## **Retention**

- Collaborate with Mentor Program to ensure member participation.
- Offer and promote participation in Fundraising Day and scheduled workshops
- Offer and promote participation in the Annual Meeting/Holiday Party (December 2008).
- Continue to contact **all** new members with a welcome and list local chapter contacts and event dates

## **Marketing**

- As a member of the National Philanthropy Day Committee I will distribute information to potential AFP members in the community
- Continue to provide new member information to the already existing chapter newsletter and distribute email communications related to upcoming events.
- Promote awareness of philanthropy through development and dissemination of press releases; speaking to local groups, etc.

**Sample for Chapters with 101-250 Members**  
**Oregon Chapter, AFP**

**(Goal Area I: Chapter Membership)**

**Strategic Analysis & Planning Direction**

***VP of Membership***

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**Definition:**

- ❑ To attract new members for AFP and develop loyalty and sustained pride in membership for existing members.

**AFP International Ten Star Award Criteria:**

- ❑ Net increase in membership from previous calendar year.
- ❑ Communication with members on a regular and consistent basis.
- ❑ Conduct at least one event or activity focused on recruitment or retention of members.

**Target Audience(s):**

- ❑ Experienced fundraising professionals in a variety of nonprofit organizations throughout Oregon and SW Washington
- ❑ Consultants in fundraising and related vendor services doing business throughout Oregon and SW Washington

**Historical Perspective/**

**Current State:**

- ❑ AFP Oregon is stable at roughly 125-130 members after a period of decline and rebuilding. After a period of retrenching and strategic planning, we are poised to increase membership through active recruitment of qualified prospects and thoughtful stewardship of current members. Competition for the time and talents of those in our profession is steep, and members do not like to waste their time with organizations that have little value added. Our job is to communicate to new and existing members that their AFP membership is of great value by 1) making them feel welcome and included, 2) making sure that they know of resources that are available both locally and nationally, and 3) providing first-rate programming that they cannot get anywhere else in the state.

**Membership History:**

- ❑ 2002 61 members
- ❑ 2003 122 members
- ❑ 2004 119 members
- ❑ 2005 129 members
- ❑ 2006 122 members

**Projections:**

- ❑ 2007- 140 members
- ❑ 2008 – 150 members

**Impact of Local or National AFP Policies or Guidelines**

- ❑ The high price of national membership is definitely a factor. Members do not realize that most of that, money goes to national, and expect big things for their large investment. National does not do a good job of communicating with local members about the national benefits of AFP; therefore, we must make that part of our marketing/communications charge.

**Assessed Weakness/Threats:**

- ❑ A higher membership price and with fewer local benefits.
- ❑ Limited chapter networking opportunities and member engagement.
- ❑ Individual capacity and demands of professional life.
- ❑ Limited local programs.
- ❑ National competition: AHP, CASE.
- ❑ Local competition: WVDO, INPM, TACS.

**Core Member Benefits:**

- ❑ Membership is inclusive of local, national and international presence.
- ❑ Access to professional resources from national AFP.
- ❑ Affiliation with Code of Ethics and national lobbying efforts.
- ❑ Partnership with CFRE and local interest and growing demand for CFRE training.
- ❑ Membership comprised of seasoned professionals.
- ❑ Higher level program offerings.

## **Benchmarking: Promising & Best Practices:**

### ***AFP-West Michigan Chapter: The "Positive" Approach***

Chapter announcements of monthly educational programs make the distinction between the cost for AFP members and "not-yet members" and replacing the term nonmember with the positive expectation that attendees will find such value in the program that they will apply for membership. Not-yet members who join AFP at the workshop are refunded the difference between the member and not-yet member fees.

### ***AFP-Oklahoma Chapter: Partnership with the Oklahoma City Community Foundation***

Recognizing the potential impact the AFP Oklahoma Chapter can have on the local nonprofit staff and board through membership opportunities, the Oklahoma Chapter identified the Oklahoma City Community Foundation as a potential partner to increase the capacity of local nonprofits to engage in ethical and well-educated fundraising practices. The Community Foundation's Agency Capacity Building Program seemed an ideal match for providing scholarship funds to local nonprofits to have one staff member join AFP -- the staff person charged either with development and fundraising or the executive director.

### ***American Marketing Association/Oregon Chapter***

The local chapter of AMA counts one of the largest memberships of professionally based membership organization in the Portland Metro area. The chapter utilizes the following strategies to recruit, grow and retain membership. Scheduled communication to members and not yet members, with preferential treatment provided to members. Offer a diverse array of morning, lunch, and after hour's programs. Members and not yet members alike may purchase a four pack of programs. The primary drivers of success seem to be attentive, consistent communication and diverse programming to its membership and all identified prospects.

## ***Willamette Valley Development Officers, WVDO***

Although the organizations focus is target to new and mid-level professionals. The organization utilizes scheduled communication, consistent programming including national presenters, and opportunities for volunteer engagement to recruit, grow and retain its membership. A unique member benefit includes access to the Job Source service.

### **Opportunity Assessment:**

- ❑ AFP Oregon has just come off more than a year when we did no programming at all in order to do a strategic review. Now that programming has resumed, and we have a clear focus and contrast to other development associations, we expect each program to generate a few new members.
- ❑ CFRE training also offers an avenue for expanding membership through AFP's association with the credentialing body of the profession.
- ❑ More personal outreach and stewardship will pay off in increased retention of existing members.
- ❑ Growth/stewardship of the AFP student chapter in Eugene should produce graduates who gain entry into the field and become members of AFP.
- ❑ Create more local benefits, e.g. Mentoring Program.
- ❑ Seek to create high level networking opportunities for members.
- ❑ Increase chapter visibility.

### **Chapter Objectives:**

- ❑ Recruit 25-40 new members.
- ❑ Improve retention rate to 85%.
- ❑ Each AFP member is contacted at least once personally during the year.
- ❑ Each new AFP member is contacted within a month of joining.

### **Individual Activity Path to Achieve Objectives:**

- ❑ *First Quarter:*
  - Personally invite all current members to social function.
  - Each Board member contacts two new members to welcome them to AFP Oregon.
  - Each Membership Committee member contacts 10 prospective members.

- Membership materials with local slant are designed.
- AFP Programming resumes.
- Plan one activity in Central Oregon
- ❑ *Second Quarter:*
  - Capitalize on the “bump” in interest that follows Philanthropy Day
  - Mailing to members – use new materials.
  - Possible handout at Luncheon.
  - Plan one activity at the Coast.
- ❑ *Third Quarter:*
  - Continue to steward and contact members.
  - Plan one activity downstate
- ❑ *Fourth Quarter:*
  - Plan one activity in SW Washington
  - Communicate with members via mail or email
  - Plan social/networking event for members.

### **Target Outcome Metric:**

- ❑ 150 members and a retention rate of 85%.

### **Oregon AFP Infrastructure / Resource Needs for this Goal Area**

#### **➤ Internal:**

- Marketing materials based on local benefits.
- High quality, high value programming
- Frequent communications with members
- Statewide activities/programming
- Help with mailings, lists etc.

#### **➤ External:**

- Coordination and partnerships with other professional associations in the state, i.e. WVDO, CASE Regular statements to the media from AFP chapter when fundraising/philanthropy is in the news.
- Partnerships with other allied organizations.

## **Sample for Chapters with 251-400 Members**

### **AFP San Diego Chapter 2008 Membership Recruitment, Retention and Marketing Plan**

#### **Recruitment**

*Goal: Increase overall chapter membership by 10% or more from 313 to 345 members on 12/31/08.*

#### **I. Outreach to Prospective Members**

- Email or follow-up phone call with invitation to join to all visitors attending any AFP event
- Partner with Senior Initiatives committee to get 100% of board members to join
- Partner with Diversity committee to offer scholarships to potential members (co-host diversity breakfast)
- Partner with Communications committee to include membership information in all press releases and other media coverage
- Distribute membership materials at all events, including NPD
- Contact local fundraising programs (UCSD, etc.) to encourage membership among current students and faculty
- Explore a collaboration with Nonprofit Management Solutions to get membership information to their program participants and members

#### **II. Implement Incentive Program for Current Members**

- Provide special discounts to encourage members to invite colleagues, board members, or supervisors to chapter meetings or events.
- Recognize and reward current members for recruiting new members

#### **III. Scholarship Program for Prospective Members**

- Increase the number of initial memberships for fundraisers who are new to the field (0-3 years or career transition), ethnically or culturally underrepresented in the profession locally, and who work for organizations with limited annual budgets

(<\$1,000,000) or are part of development teams at large institutions where budget limitations restrict the number of memberships they are able to fund.

- Fund educational opportunities (workshops, conferences other than AFPI) for current members who meet one or more of the above criteria to encourage them to become more involved in chapter activities.
- Provide opportunities for non-members who meet one or more of the above criteria to experience chapter meetings or events on a trial basis.

### Retention

*Goal: Increase chapter retention from 77% to 80% by December 31, 2008  
(we need the true 12/31 total first)*

#### **I. Improve Member Recognition**

- Board and membership committee serve as greeters at all chapter meetings and other events to make all members feel welcome and encourage involvement
- Ribbons on name tags of all new members for easy identification (all members expected to greet and make them feel welcome)
- Welcome letter and phone call to new members and visitors attending orientation
- Recognize member anniversaries at chapter meetings

#### **II. Communicate the Value of Membership**

- Letter of thanks for continued participation sent to current members 90 days before membership expires (includes recap of benefits)
- Phone calls or emails from membership committee made to all lapsed members each month
- Benefits bookmarks available at all chapter events (summary of benefits)
- Distribute handout listing membership benefits to all attendees at two chapter meetings (spring and fall)

### **III. Increase Participation in Chapter Activities**

- Recruit table “hosts” at chapter meetings to facilitate conversation and get suggestions for new events and programs
- Invite all new and renewing members to serve on a committee or volunteer in other ways
- Partner with Web Conference chairs to publicize these events more effectively since survey results show that nearly half of the 2007 survey respondents had never attended one although they are free to members

### **IV. Upgrade Annual Membership Reception**

- High-profile philanthropist speaker to generate increased membership attendance and more community interest
- Partner with a local nonprofit or other organization to sponsor event
- Centrally located, executive-style venue with larger budget for food and beverage
- Board phone calls to all new members to personally invite to attend
- Special recognition of all new members at event
- Membership table at event staffed by membership committee and volunteers

## Membership Marketing

*Goal: Develop and implement five (5) new strategies to increase awareness of benefits of AFP membership among prospective and current members by December 31, 2008.*

- I. Design “Benefits” bookmark listing key member benefits**
- II. Update Membership Benefits pages on chapter website**
- III. Design and post Member Incentive Program page on chapter web site**
- IV. Design and post Scholarship Program page on chapter web site**
- V. Send email blast to all members to introduce Incentive and Scholarship programs and encourage participation**
- VI. Follow up on key items from 2007 membership survey and implement changes to increase member satisfaction and outreach to prospective members**
  - Conduct mini e-mail surveys to follow up on individual questions in more detail (maybe one each month)

**Sample for Chapters with 400+ Members**  
**Association of Fundraising Professionals (AFP)**

**Greater Houston Chapter**  
**STRATEGIC PLAN**  
**2008**

***CHAPTER MISSION AND VISION STATEMENT***

**MISSION**

The Association of Fundraising Professionals Greater Houston Chapter (AFP-GHC), an individual member association, advances philanthropy through education, training, mentoring and advocacy based on a code of ethical principles and standards of professional practice.

**VISION STATEMENT**

The AFP-GHC is the leading professional association of individuals in Greater Houston engaged in facilitating the philanthropic process, inspiring and training its members in their efforts to generate support for worthy causes that benefit society.



## **MEMBERSHIP (Dawn Koenning)**

### **VISION STATEMENT**

To proactively recruit and encourage all fundraising professionals to become and remain members by promoting AFP's support, professional assistance, training, opportunities for leadership, and the fellowship of colleagues.

### **Recruitment Chair (Carroll Foley & Susan Truax):**

**GOAL: Carry out membership recruitment activities to increase the Chapter's net membership to 600 by the end of 2008.**

1. Increase the Chapter's net membership to 600 by enhancing outreach and promoting membership at all Chapter activities.
2. Utilize luncheons and other AFP hosted events to encourage visitors to join. Continue fishbowl drawings for free lunches and subscriptions and follow up with business cards after luncheons.
3. Track number of new members that result from follow-up phone calls/free lunch drawings.
4. Organize process for Board members to submit names of two professionals who should be AFP members to Membership Committee for follow-up. Encourage each Board member to recruit at least two new members.
5. Work with United Way to identify new nonprofits in the Houston area and market to those individuals – Ronnie Hagerty can help facilitate.
6. Identify top 10 prospect list of professionals who should join AFP and develop a strategic plan for each prospect's membership ask. Work with Membership Committee and Board members to implement.

7. Increase membership presence at local AFP educational events including Ask the Experts, Best Boards, audio conferences, and National Philanthropy Day.

### **Membership Retention Chairs (Katie Blakely and Sheridan Joslin):**

**GOAL: Expand awareness of member services and carry out membership retention activities to achieve a year-end retention rate of 80%.**

1. Contact members two months before membership lapses to prompt renewal and, in some cases, help the member renew.
2. Send handwritten welcome notes to each new member.
3. Call or e-mail new members on a monthly basis and invite them to sit with a Membership Committee member or Board member at the next AFP luncheon.
4. Contact lapsed members one month after membership is lapsed. Final follow-up to encourage renewal.
5. Attend all luncheons. Work with Member Involvement Chair (Ed Benyon) to have Board and Membership Committee members sit at all tables and engage members and guests.
6. Focus on retention of second year introductory members. Reduce drop-off rate after second year of membership by calling these people first.
7. Every six months, invite a new member to join the Membership Committee.

### **Membership Marketing Chairs (Nicole McWhorter and Holly Williams):**

**GOAL: Identify and capitalize on opportunities to market AFP membership to member prospects, and assist in publicizing the value of membership to current members.**

1. Work in collaboration with Recruitment and Retention chairs to ensure membership information is included in monthly newsletters. Write membership articles each month, profiling one (or two) members.
2. Assist Mixers Chair in marketing three chapter membership mixers.
3. Send birthday emails to current members.
4. Attend all luncheons and develop marketing plan for those luncheons as well as other AFP sponsored events.
5. Market new membership scholarships and coordinate awarding of the scholarships.
6. Collaborate with AFP-GHC marketing efforts to ensure membership is a high priority.

### **Member Involvement Chairs (Stacey Frank and Bracken McGee):**

**GOAL: Cultivate increased involvement with AFP among membership constituency by encouraging active volunteering with a chapter committee.**

1. Communicate with chapter VPs to identify opportunities for members to get involved with committees.
2. Implement a system to assign members to chapter committees and track member involvement.

3. Evaluate current member involvement to establish goals for future member involvement outcomes – e.g. increase member volunteer numbers by XX% in 2009.
4. Work with the Retention Chairs to engage Board members in member involvement at monthly luncheons by assigning Board members to tables to facilitate discussions and meet members.
5. Attend monthly luncheons and membership mixers to promote volunteer involvement among members.
6. Work with the Membership Marketing Chair to publicize involvement opportunities in the monthly newsletter.

*Mixers Chairs (Reema Tandan and Sheridan Joslin):*

1. Plan three chapter membership mixers (March 27, May 12, Fall TBD) – recruit a committee of volunteers to support and organize these mixers.
2. Coordinate date, venue, and registration at each orientation mixer.
3. Make calls to luncheon guests (using business card collection) and new members (3 months of new members) to personally invite them.