

MEMBERSHIP

makes a difference

A Guide to Membership Development

2008

Canadian
Home Builders'
Association



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The Membership Makes a Difference Guide has been prepared by the Canadian Home Builders' Association (CHBA) to assist local HBAs with membership development.

The *Guide* is designed to offer local HBA Executive Officers and Chairs of Membership Committees an in-depth look at developing and implementing an effective recruitment and retention program. It is also intended for local HBA Presidents and other leaders whose commitment and direction are needed to support the efforts of staff and volunteers.

Membership development touches the core of the CHBA. Members are the foundation of our Association. A solid and committed membership is crucial to our ability to fulfill our mission and purpose, and to provide lasting benefits to our members and to the industry as a whole.

Members join and renew their membership at the local level of the Association, and membership development is therefore primarily an activity carried out by local HBAs. Nationally, the CHBA supports local and provincial efforts through membership development tools such as this guide, and through a wide range of member services and activities.

Membership development is challenging, demanding and rewarding. It takes planning, discipline and commitment. It requires an investment of time and resources. It relies on the support and efforts of dedicated volunteers. And it depends on the Association at all levels—national, provincial and local—delivering services and activities that have meaning and value to members.

For those involved in membership development, the rewards can be significant. Volunteers are vital to maintaining a strong and stable membership, and in helping the Association to grow. Their efforts support the Association's role as the voice of the industry, respected and trusted by governments and consumers.

Attracting and keeping the right members—companies that share the vision and values of the Association and see membership as a long-term investment in the success of their business—is always challenging.

- Local membership recruitment efforts need to be carefully targeted at companies with the greatest potential to become committed members. Membership benefits and opportunities must be presented in terms that matter to the individual business and reflect the realities of the business environment.
- The first-year member experience is crucial. A program of new member communication and education—e.g. a formal welcome process, an orientation session and periodical personal contact—helps new members to get settled in the Association and benefit sooner from their membership.
- "Involved members are committed members." Volunteering offers a range of benefits, from opportunities for business contacts and personal development to contributing to the "greater good", and adds to the value of the membership experience. Lack of time is the greatest barrier to member volunteering, challenging Associations to find new ways to make volunteering more manageable and attractive for members.

- Experienced, loyal members are a tremendous asset and play a vital role in carrying out the Association's mandate. In the second and subsequent years of membership, the focus of the Association's efforts should be to increase members' understanding of the Association and their sense of ownership, and to continue to demonstrate the value of membership.
- *Recruitment* offers a systematic ten-step approach to getting new members.
- *Membership Experience: The First Year* offers a roadmap to renewal through welcome, orientation, integration and involvement.
- *Membership Experience: The Second Year and Beyond* stresses the importance of a continued effort for member satisfaction and loyalty.

The *Guide* provides a solid starting point for your Association's membership development program—from recruiting through the key steps of the membership experience.

- *Strategic Framework* takes a look at the main considerations for membership development, before an action plan can be prepared: the purpose of membership development, the profile of your membership, and the Association's member services and activities.
- *Planning for Membership* sets out basic principles for membership planning, and outlines three major components: recruitment, first-year membership, and membership in subsequent years.

There is always more to learn about membership development. Share your successes and your lessons with leaders and membership volunteers within your own organization, and with your peers and colleagues across the country.

Membership makes a difference. And with a sound approach to membership development and a well-rounded program of services and activities, you will be well on your way to realizing a vision shared by all CHBA members.

2 Strategic Framework

Before you can prepare a detailed plan for membership development, you need to create a strategic framework. What is the big picture? What are you trying to achieve? What kind of membership are you seeking to develop? What are the fundamental services and activities needed to attract and keep members?

This is a vital first step. Even if your Association's membership development is already successful, it is important to pause periodically and consider if you are still going in the right direction, and if there is room for improvement. Even highly effective Associations can usually become better still at membership development. Perhaps just as crucial, what is your definition of success, and do you have a clear sense of whether or not your membership development efforts are achieving the results that you envisioned?

The strategic framework covers three main areas:

1. The purpose of membership development—what are you trying to achieve?
2. A profile of your membership—who are they and what matters to them?
3. Association services and activities—what do you need to have in place to attract members, meet their needs and fulfill your Association's mission?

The Role of the Association Leadership

Your Board of Directors is responsible for setting strategic directions for your Association, including the strategic framework for membership development. Association staff and the Chair

of the Membership Committee need to provide the information and insight required for the Board to make sound and effective decisions.

This information can include:

- Membership statistics: recruitment and retention year over year, trends, forecasts, business and marketplace influences, etc.
- Membership composition, e.g. business categories and types: gaps and opportunities
- Member feedback: satisfaction, reasons for non-renewals, etc.
- Recruitment and retention activities
- Challenges to membership development
- And more...

The Purpose of Membership Development

What's the purpose of membership development? It may sound like a simple question, but it is in fact one that requires careful thought. The immediate answer that often comes to mind is to recruit and retain as many members as possible. That is only partly correct.

Build a Strong Association

The primary purpose of membership development is to build a strong organization. Your Association is a reflection of your membership, and without a strong membership it is difficult to function effectively. Membership supports your capacity to provide an appropriate range of member services and activities, and it enables you to accomplish your Association's mission as the voice of the residential construction industry.

Create Stability and Predictability

A stable membership helps to achieve financial predictability. This in turn means that you can plan ahead with greater confidence and do a better job of delivering your activities and services.

A small annual turnover is expected and should not affect the Association's ability to carry out its business. A large annual turnover, on the other hand, can create uncertainty and force the Association to spend too much time and too many resources on recruitment, to the detriment of other important activities.

Focus on Retention

Existing members are the mainstay of your Association and should be given first priority.

Experienced, committed members are an asset to the Association and your ability to carry out the organization's agenda. Experienced members become committee chairs and leaders and provide continuity both within and outside the Association. They also help to attract and retain new members.

It costs less to retain a member than to recruit one—sometimes considerably less. The higher the rate of retention, the greater the "lifetime value" of a member to the Association. This means that members will support the Association financially for a longer period, which improves the overall capacity to serve the needs of both members and the industry. It also means a stronger volunteer base with which to provide services. And with a higher retention rate, there can be a greater return to the Association for its financial investment in the recruitment of members, because they renew their membership for a longer period. A solid membership base

means that more resources can go into creating and maintaining a high level of services and activities, which in turn can increase retention rates even further.

Manage and Sustain Growth

With high retention rates, recruitment can become primarily a tool for growth (after replacing non-renewing members). Membership growth brings more revenues and more hands to share the work. It can also create greater credibility with government and more "clout" in the community.

If your Association recruits a large number of new members, you must have the capacity to retain them. You must be able to provide the services and activities that members were promised. If new members don't have the experience they expect, you risk losing them.

Profile of Your Membership

Who should belong to your Association? The obvious answer is that any company involved in the housing industry could be a potential member.

But there is more to it. Your reputation, your standing in the community and your ability to access and influence governments and other decision-makers are closely linked to your membership. So is your ability to attract new members—they want to know who you represent, in order to be certain they join the right company of peers.

The right members contribute to your reputation. The wrong ones may detract from it and undermine your efforts.

Membership Development is Not Simply a “Numbers Game”

By nature, associations in general are geared towards recruiting and retaining as many members as possible.

Membership numbers are important, of course, but they have to be seen in the bigger context of what you are trying to achieve.

A stable membership is the underpinning of an effective Association. The more this is tied to a high rate of membership retention coupled with strong new member recruitment, the more your Association is able to focus on its main mandate, which is to conduct the daily business of the organization on behalf of members—i.e. work to achieve the mission and purpose.

Growth can help your Association become better, more effective and offer greater value to members. With additional membership revenues, you can invest in more staff, equipment and space, and strengthen your capacity to deliver services that benefit members.

However, this is most likely to happen when growth is well planned, sustainable and designed to bring long-term members.

Bigger is not always better. Growth for the sake of growth can be a two-edged sword. Bringing in new members simply to boost numbers and revenues is too often followed by poor retention. This forces another cycle of recruitment to bring the numbers up again, which diverts time, energy and resources from other activities and services.

It is often said that there is strength in numbers. This is true, provided you have the right members. The size of your membership does matter—at city hall, with the media and so on. The larger your organization, the less others can afford to ignore you. However, the strength of your organization comes from much more than the numbers.

Associations need to manage the recruitment and retention of members closely and consider the nature and quality of their membership, in order to maximize the strength of the organization.

This goes hand in hand with the need to understand what members look for in an Association, what’s important to them, and how you get them engaged and help them become long-term committed members.

What Do You Want Your Association Membership to Look Like?

If you were asked to describe your ideal membership, you might say:

- We represent a broad spectrum of companies in the housing industry, with a strong core of new home builders, renovators and developers.
- Our members are respected in their community, by their peers and by their customers.
- Our members take pride in the industry and appreciate the importance of being involved in the Association.
- They see membership in the CHBA as a natural extension of their business and professional activities.

- They recognize the importance of having a common voice for the industry and making it heard.
- They see membership as a long-term commitment and investment.
- They voluntarily adhere to the Association's Code of Ethics.
- They support the CHBA Member Builder's Statement of Business Values and Commitments and actively pursue the core values of integrity, professionalism, responsibility, community and leadership in their own businesses.
- Our Association includes young entrepreneurs and the up-and-coming leaders of tomorrow.

Where Do Your Members Come From?

The residential construction industry involves a wide range of businesses and professions. An effective Association represents the many facets of the industry.

- **New home builders, renovators and developers are the core constituency of your Association.** These are the people and companies that play a central and direct role in building homes and creating communities.

Associations need a strong core membership in order to present themselves credibly as the voice of the industry.

When your Association speaks out on issues of importance, when you meet with local building officials or when you issue a news release, you need to be able to say with confidence that you represent the home building professionals in your community.

You want your Association to represent the best of the industry in your community, not necessarily all of it.

This doesn't mean that every new home builder, renovator and developer in the community must belong. Rather, you want to recruit the key players in your community—companies that are aligned with the Association's values, are respected and trusted in the community and will add credibility and substance to the organization.

- **Suppliers and other related businesses, services and professions** contribute to the business of new home building and renovation. This includes trades, designers, technical consultants, and so on.

The success of these companies is tied to the performance of your core constituents. When new home builders, renovators and developers are successful, all other related businesses benefit and prosper.

The conditions in the marketplace affect everyone. Suppliers and related businesses, services and professions have an important role in the industry and the Association, working side by side with new home builders and renovators to promote a fair and dynamic business environment.

Members of the Future

The residential construction industry is "graying" at a rapid rate. Young entrepreneurs represent the next generation in the industry and must be encouraged to get involved in the Association as members, volunteers and leaders.

It is important to keep in mind that younger people in the industry, particularly those under 30, are at the beginning of their careers. Their attitudes, expectations and needs tend to differ somewhat from those of their older colleagues, and it may require a deliberate decision and strategy to attract and retain them as members.

For instance, professional development, employment opportunities and development of leadership skills are more important to younger members than older, more experienced ones.

One idea is to create a special forum for young entrepreneurs, such as a council, committee or working group. This gets them involved in the Association, provides them with the experience they seek and also serves as a training ground for future leaders of the Association.

How Are They Admitted to the Association?

A formal application and approval process for entry into the Association is an important aspect of building a strong organization of members who are reputable, respected and doing business the right way.

- **The CHBA Membership Criteria** set out a series of requirements for admission to the Association related to professionalism, such as financial stability and professional business practices. This, combined with a process that allows for member input on applicants, ensures that every member company is screened and vetted prior to joining.

Membership is granted based on performance and values as evidenced by a company's commitment to ongoing training, consumer protection and the Association's Code of Ethics.

Good recruitment helps to ensure a good member fit, for the benefit of everyone.

- Beyond that, the "fit" between a member and your organization is often determined by how well a member understands what your Association is all about and what they can expect from membership. Good recruitment practices will help to clarify the Association's values, member services and opportunities so that realistic expectations are set *before* joining.

What's Important to Know About Members?

Knowing how companies in general view Association membership and what they look for provides helpful directions for your Association for both recruitment and retention purposes.

- **Membership is a business proposition.**

Companies join the Association because they believe it makes business sense. They want their membership to assist them in achieving business success, and they want the Association to be an effective advocate on their behalf.

This doesn't mean that they don't value or want to participate in social activities. Members still enjoy the camaraderie of the industry—getting together with their peers on the golf course and at other social events. But it is the Association's business agenda that draws them in and keeps them.

- **There must be an understandable return on investment.** The decision to belong to the Association is based on the perceived value of membership.

Membership has to be justifiable (i.e. be seen as a good investment). It needs to give companies a "leg up"—an inside track on what's going on in the industry, differentiation in a competitive marketplace, an opportunity to increase business, a higher profile in the industry or community, or some other benefit that contributes to a company and its bottom line.

Members may have to justify the expense of membership within their own company. They need to understand, in uncomplicated terms, the return on this investment, so they can explain it to their boss or manager—"Here is why we need to belong to the Home Builders' Association."

The Association needs to help members understand the full scope of the value of membership, as the return on investment is not always easy to measure.

From political representation to individual business opportunities, from technical information to credibility in the community, and much more...these are all returns on investment in membership that must be communicated clearly and frequently to new and existing members alike. Most importantly, they must be presented in ways that are relevant to members' businesses.

Stopping Bad Things from Happening is a helpful document from the CHBA National Office that details how new home builders have avoided thousands of dollars worth of extra costs due to the Association's active intervention with government at the national level.

- **It must be easy to get value from membership.** Time is at a premium. Most business people have limited time to familiarize themselves with the Association, to participate in activities and get involved. As a result, you have to make it easy for members to experience the value of membership.

Be proactive. Bring your services and activities to your members' attention rather than letting them discover them on their own. Communicate often and clearly, using multiple formats, e.g. print and the Internet. Make it easy to use your services, e.g. fast

and simple registration or ordering. Encourage members to participate and point out specific opportunities matched to members' interests.

- **People are drawn to success.** People want to connect with the movers and shakers in their industry. Sometimes one of the most appealing aspects of membership is simply being part of a successful group and how that enhances a company's reputation.

When the Association is seen as the organization that represents the best of the industry in the community, and members are perceived to be successful companies with strong values and a commitment to "do business the right way", then other companies like them are drawn to it.

- **Members care about the common good.** Beyond individual interests, i.e. "What's in it for me?", members also value being part of something bigger.

Part of the intrinsic value of membership is the ability to associate with others for a common purpose and work together to advance a shared cause. Members' understanding of the Association's common purpose grows over time, and the Association has an important opportunity, and responsibility, to communicate the value of collective action and nurture members' desire to promote the "common good". This includes encouraging members to become volunteers and leaders.

Studies show that younger people are less inclined to make time sacrifices than the older generation, unless it is clear how it will benefit them in their careers.

- **Flexibility is key to volunteering.** While many members are satisfied with "general participation", some are ready to get more engaged and play an active role in the Association by volunteering.

Members' time is limited and they want to use it well. They want to make a difference and feel they are making a meaningful contribution. At the same time, they may be hesitant to take on long-term commitments. Young people in particular want to get in there, figure out how to get things done, and then do it.

It is important for Associations to encourage involvement and find suitable ways to get members engaged. Increasingly, this means redefining volunteer tasks by breaking them into smaller, more manageable time commitments with definite timeframes. It is also important to understand and spell out the business and personal benefits that will be most attractive to members, e.g. opportunities for business contact, increased credibility and leadership experience.

Associations are having to fast-track the leadership development process, as members are not willing to invest years in climbing the leadership ladder. The traditional path from general member to elected leader is getting shortened and simplified.

- **Members want customized service.** Not all members are the same, and a single approach will not work for all.

Today's members expect to be addressed by their name, not simply as "Dear Member".

Your membership encompasses a wide range of companies, but no matter what business they are in—whether they are new home builders or suppliers of materials or services—they expect your Association to understand their particular business priorities. They expect you to provide support and opportunities that are relevant to them, and to explain how they benefit, directly and indirectly, from their membership. They also expect you to treat them as individual members, not just a nameless entity.

That means you will have to tailor your communication, events and opportunities to various segments within the membership.

- **The decision to renew is made throughout the year.** New members don't wait until the end of the year to form an opinion of your Association. Every experience they have with you throughout the year has an impact, and every point of contact is important. As the experiences accumulate, members begin to develop a sense of whether they are getting value for their time and money.

It often doesn't take a lot of experiences, e.g. a couple of personal encounters and a few visits to your website, before the final decision begins to emerge. If they like their experiences, they'll stay. If they are dissatisfied, they will not renew.

It may not take much to sway new members either way. Was a telephone inquiry handled with courtesy and personal attention, or was the staff member curt, hurried and not helpful? Was a document easy to find online, or did the member have to give up in frustration? Seemingly small events can have potentially big impacts.

That's why it is so important to get new members off to a good start, and to stay in regular touch with them during their entire first year. If you find out at the six-month mark that they are unhappy or not participating, you can make a course correction and turn their opinions around. Otherwise you may only find out at renewal time, when it could be too late.

- **You are still on trial the second year, and after that.** Business people continuously assess their decisions to ensure that they are getting full value for their investment. This includes their Association membership. A first-year renewal does not guarantee renewal in the following years.

Associations need to make sure that members, even long-term members, continue to enjoy their membership, understand the value of belonging and feel that they are getting a good return on their investment.

Member Services and Activities

In order to meet your members' expectations and fulfill the Association's mission, you need to ensure that you have the right combination of services and activities in place.

Missions and visions by themselves do not attract or retain members—services and activities do. People may appreciate the vision and agree with your mission, but ultimately what matters is what you actually do, and especially what you do for them.

In reality, most of your members may never fully understand the intricacies of your Association's vision, mission, mandate and policies, or be interested in them. For most, membership is a practical undertaking, as is their own business.

That's why it's important to use plain language to describe your services and activities.

Simple, strong statements, such as *"We are the voice of the industry"*, are clear and easy to understand.

Make it just as easy to figure out what it means in practice, e.g. *"Here is what we do to make our voice heard"*, or *"This is what happens when we speak out."*

The best non-profit organizations are those with a close link between their mission and vision on the one hand, and their services and activities on the other.

In other words, *"This is what we stand for. Here is how we put our beliefs into action."*

The Menu of Services and Activities

Just about everything your Association does can be defined as a member service or activity. Whether or not members are directly involved or have any presence in a specific activity, they are always the ultimate beneficiaries of your Association's efforts.

Every local HBA is engaged in a range of services and activities. Key areas include:

- **Information**—providing members with news, insight and in-depth analysis of issues and concerns that affect their businesses, their markets and their customers.

Information is available everywhere, but only the Association can give members industry-specific information that is tailored to their needs and interests and reflects their point of view. This is an important function. In an era of information overload, your organization serves as a filter to separate the substance from the "noise".

From fast-breaking news to exhaustive research reports, the Association helps members increase their knowledge about the issues that matter to their business and keep up-to-date on the latest developments in the industry, large and small—from technical issues to financing to marketing—that can affect a company's performance. This includes keeping members informed about activities and accomplishments at all three levels of the Association.

- **Networking**—giving members opportunities to meet and connect with others in the industry, to make business contacts, exchange information, work together on common causes and socialize.

This is a key function of your Association. It is through networking particularly that members develop a sense of belonging and fellowship—"I am part of a much bigger group, part of an important industry."

- **Political representation**—improving the business environment for members by addressing local issues and challenges.

New home builders, renovators and developers face complex challenges in many aspects of their business that are beyond their immediate and individual control, such as development charges and regulations—issues with a wide-ranging impact. Through representation by the Association, they have a way to have their voice heard by government, to influence decision-making and make a difference to their own business and to the industry.

Members need to know that their Association is working on the issues that "bug" them—that we listen to them, understand their problems and are out there finding and creating the solutions.

The Association works hard—with and for their members—to protect housing choice and affordability, and the ability of the industry to provide a diverse range of housing in their communities.

- **Education and training**—providing professional development and skills training for members to increase their capabilities, credibility and profitability.

From breakfast seminars to daylong workshops to industry certification programs (the exact offerings vary from one local HBA to another), members can learn the latest from the experts in the industry on topics that are critical to their success, such as marketing, construction innovation and workplace safety.

Where they exist, professional certification programs give new home builders and renovators the knowledge and skills to run a successful company, from building science to human resources management. The CHBA Membership Criteria make participation in these programs mandatory for members.

- **Representation to the public**—creating a positive image of the industry, the Association and members in the marketplace.

Membership needs to translate into credibility in the marketplace. Recognizing the importance of public perception of the industry, local HBAs take pains to position themselves and their members as a positive force in the community and a source of reliable, trustworthy information.

This happens through a range of ongoing outreach activities, such as consumer awareness and education, media relations and participation in community events and charities. Websites (national, provincial and local HBA sites) help to support the messages.

- **Marketing**—exposure and sales opportunities through Association activities.

Members can take advantage of a range of Association campaigns and events to increase their profile with the public and connect with potential customers, such as parades of homes, home shows and awards programs. These activities offer great benefits for all members, and particularly for small new home building and renovation companies that usually have limited marketing budgets.

Also, local HBAs offer a variety of member-only opportunities for suppliers to present their products or services to new home builders and renovators.

- **Technical support**—keeping members up to date on technical developments, challenges and solutions.

New home builders and renovators constantly face new technical challenges and issues—that's simply part of the business. Local HBAs serve an important function as the contact point at the local level, ensuring that their members have access to the technical information they need and the support required to find effective solutions to technical challenges.

- **Savings**—offering discounts through group benefits on business products and services.

As a direct and very tangible member service, local and provincial HBAs secure preferential rates for their members on a range of items, from gasoline to cell phones

to insurance. Small companies in particular can sometimes save hundreds of dollars. On their own, they have little or no bargaining power when it comes to things like insurance for their business.

National and Provincial Activities

The CHBA is one Association at three levels. Membership is experienced primarily at the local level, but the benefits go beyond what is offered there. National and provincial activities are an integral part of your Association's services and the value that members receive.

Members must be made aware right from the outset that their membership fee works for them at three levels. Their company may be operating locally, but their business is profoundly affected by regulations and events at both the provincial and national levels. The CHBA's membership fee structure reflects this reality, with members paying full membership fees for each membership held through local HBAs. The provincial and national offices of the Association work to protect and promote members' interests at those levels.

In addition, the provincial and national offices develop a wide range of services, activities and products for use by local HBAs, for the benefit of all members across the country.

Evaluate and Evolve

The scope and quality of your Association's services and activities are big factors in your success in recruiting and retaining members.

Over time, priorities change. Issues that matter to your members will change in response to new developments and events. Other issues will disappear, some because a satisfactory solution was found, and new issues will emerge. Make sure to keep your services and activities up to date, in order to remain relevant to members and maintain the value of membership. Remember that this will vary by type of member.

- **Review and assess your HBA's services and activities regularly.** What services and activities are you engaged in? Are they still valid? Do they support your mission? Do they provide value to members? Are you communicating the benefits clearly to them? Are there gaps or areas where you could be more active?

On the other hand, are you spreading yourself too thin? Trying to do too much? No organization can be all things to all people. Can you drop some peripheral activities or services without affecting the value of membership?

Keep your finger on the pulse of your membership. What's on members' minds? What's challenging them in their business at this moment? How can your activities and services benefit them or make a difference?

- **Watch participation rates.** Keep an eye on member participation in dinner meetings, social events, workshops and so on. Modest fluctuations are of little concern, but sudden or sizeable dips in attendance can indicate a problem.

- **Survey your members.** A regular evaluation process should allow for periodic surveys of members' needs and opinions. How do they rate your services and activities, and why? Do they have suggestions for improvement to current offerings or ideas for new ones? How can you increase member satisfaction?

Use mail-out, electronic and/or telephone surveys to reach your entire membership. Try focus groups for in-depth research with a small number of members.

- **Listen to your members.** Have an open communication policy throughout the Association and encourage members to offer feedback anytime—via e-mail or phone calls to the office, or face to face with staff and elected leaders.
- **Be ready to make changes when appropriate.** Your members are constantly responding to changes in the business environment. Associations need to do the same. Always strive to do better and be better. Change delivery formats, update content, create new events, add new services and activities, and don't be afraid to drop old ones if they no longer serve a clear purpose or have value for members.

By the same token, keep what works well—don't make change simply for the sake of change.

- **Assess your Association's ability to promote and deliver member services and activities.** Don't expect members to spend time and effort to ferret out what you are doing for them. Essentially, you need to market your services and activities to your members and follow up with appropriate action.

- **Communicate the benefits of the Association's services and activities at all three levels.** Members can only buy into what they understand and perceive as having value. It is up to the Association to explain, clearly and regularly, how members benefit from specific services and actions. This may involve tailoring messages to various member segments.
- **Keep a steady eye on follow-up throughout the Association.** As the "salespeople" for the Association, recruiters enlist new members based on member services and activities. Is the rest of your organization delivering on those promises, or are there gaps? Recruiters may promise more than you can deliver.

There may also be changes over time to the operation of your Association, including new systems or processes, or a turnover in staff, which can affect the delivery of member services and activities. Check regularly and re-align promises and delivery, when and as needed.

The surveys on the following pages will help you to assess your Association's approach to membership development.

More About Surveying Members on Services and Activities

There are several different member groups that can provide you with insight and knowledge to assist in your decision-making about services and activities.

- Prospective members—What are they looking for? What would make them want to join the Association?
- New members—They may be the most enthusiastic and unbiased.
- Long-term members—They are committed and familiar with the organization.
- Lapsed members—What needs improvement for them to reconsider their decision and rejoin the Association?

Never invite prospective members and lapsed members to the same focus or discussion group.

Don't forget to talk with your staff. They have valuable insight into members' wants and needs, and what works well and where improvements may be needed.

The recruitment of new members and retention of existing ones is influenced by many different aspects of your Association:

- Leadership
- Association management
- Association services and activities
- Recruitment methods
- Welcoming and orientation process
- Member integration and involvement
- Renewal process
- Attitudes
- Communication
- Recognition
- Membership reinforcement
- Enthusiasm

One of the first steps in effective membership development is to evaluate your Association and its membership activities. The reality check surveys on the following pages are designed to help you to take stock of your Association's efforts in support of recruitment and retention.

It is recommended that the leadership of your Association fill out the surveys and share the results with the Membership Committee and others as appropriate.

The first survey, "How Does Your Association Rate on Membership Development?", takes a look at a number of different aspects of your Association, which together spell out a strong retention program. Score yourself to determine how well you are doing.

The second survey, "Membership: Is It a Priority?", is a more informal examination of your Association's membership efforts, with an emphasis on recruitment.

Take your time in filling in the answers and spend some time analyzing the results. In what areas is your Association strong and active? Where is there room for improvement? For instance, does membership development have the committed participation of the Association's elected officials? Do members receive adequate recognition for their contributions?

With the results of the survey in hand, you will be ready to go through the rest of this guide, selecting the information that is of particular interest and value to your Association.

Periodically, look at the survey again to determine if anything has changed since it was first filled out. If yes, does it affect membership development? Does your Association need to make adjustments to the membership strategy or plan?

HOW DOES YOUR ASSOCIATION RATE ON MEMBERSHIP DEVELOPMENT?

Please answer "yes" or "no" to the following questions. Once you have completed all categories, turn to the back of the survey to evaluate and analyze your membership development efforts.

Leadership

	yes	no
1. Membership development is a priority, stated in our Association's long-term or strategic plan.	[]	[]
2. Our Association has a Membership Committee that meets regularly.	[]	[]
3. The position of Membership Committee Chair is highly respected, on par with the Chair of other committees.	[]	[]
4. We have developed a membership strategy for our Association.	[]	[]
5. We set an annual membership goal based on a realistic assessment of market potential, membership renewal patterns and current economic factors.	[]	[]
6. Our annual membership goal includes separate goals for recruitment and retention.	[]	[]
7. All our elected officials fully support our membership action plan, including allocating required funds in the Association's budget.	[]	[]
8. Both membership volunteers and elected leaders participate in membership development activities.	[]	[]
9. An elected official is present at each new member orientation session.	[]	[]
10. Membership activities are highlighted at our general membership meetings.	[]	[]

Subtotal score

Association management

	yes	no
1. Our Association employs the CHBA Membership Criteria.	[]	[]
2. Our annual membership action plan includes Association services and activities, recruitment, welcome, orientation, integration, involvement and renewal.	[]	[]
3. There is a subcommittee or Membership Committee member responsible for each key membership function: recruitment, welcome, orientation, integration, involvement and renewal.	[]	[]
4. The Membership Committee works with other Association committees on membership development efforts.	[]	[]
5. Membership volunteers are supported by the Membership Committee and its Chair as well as Association staff.	[]	[]
6. We have a training program for membership development volunteers on Association services and benefits, and recruitment and renewal techniques.	[]	[]
7. We use a special theme each year to generate excitement and enthusiasm among membership volunteers.	[]	[]
8. We recognize members who contribute to our membership development activities.	[]	[]
9. The recognition we give is visible to encourage other members to get involved.	[]	[]
10. We review and evaluate our membership action plan on a regular basis.	[]	[]

Subtotal score

Association services and activities

- | | yes | no |
|---|-----|-----|
| 1. Our Association has a complete, up-to-date breakdown of our membership by business activity: new home builders, renovators, developers, trades, suppliers, and so on. | [] | [] |
| 2. We gather information on new and existing members on a regular basis, i.e. we survey our members regularly on their use and perceptions of our services and activities. | [] | [] |
| 3. We review our services and activities regularly to check how they match with our members' needs. | [] | [] |
| 4. We have an established process to initiate new membership services and activities, including determining cost, and staff and promotional requirements. | [] | [] |
| 5. We have an established process for maintaining existing and ongoing membership services and activities, including regular reviews and updates. | [] | [] |
| 6. We promote the services and activities at all three levels of the Association to our members. | [] | [] |
| 7. Our membership promotional materials present the benefits that members will receive by joining, not just a listing of services and activities. | [] | [] |
| 8. We communicate the benefits of belonging to the Association to all members on a regular basis, explaining them in tangible terms. | [] | [] |
| 9. We inform our members regularly about Association actions, priorities and accomplishments at all three levels, at monthly dinner meetings and other occasions, and through print and electronic communication. | [] | [] |
| 10. We communicate the value of membership services, such as discounts, group insurance plans, educational workshops and other programs. | [] | [] |

Subtotal score

Recruitment methods

- | | yes | no |
|---|-----|-----|
| 1. Our Association's primary recruitment goal is to enlist quality members who will stay for the long term—not just enlist members for short-term gain. | [] | [] |
| 2. We discourage "arm twisting". | [] | [] |
| 3. We explain the value and benefits of membership in terms that are relevant to prospective members. | [] | [] |
| 4. A broad base of members is involved in recruitment—it is not just the responsibility of a few members or one committee. | [] | [] |
| 5. We maintain an up-to-date list of qualified prospects. | [] | [] |
| 6. We organize at least one annual membership drive. | [] | [] |
| 7. Our membership drives are timed to take advantage of high-profile events such as home shows, awards programs, New Homes Month and Renovation Month. | [] | [] |
| 8. Prospective members are invited to join at least one social or educational function to get to know us better. | [] | [] |
| 9. We have a plan for staying in contact with prospective members. | [] | [] |
| 10. We train volunteers to recruit new members. | [] | [] |

Subtotal score

Welcome and orientation process

	yes	no
1. We have a detailed policy for welcoming new members and integrating them into the Association.	[]	[]
2. All new members are introduced publicly at general membership meetings.	[]	[]
3. The names of new members are published in our Association's communication vehicles.	[]	[]
4. Our Association provides an orientation session for all new members.	[]	[]
5. We ask sponsors to accompany their new member to the orientation session.	[]	[]
6. We also invite new representatives of long-term member companies to join an orientation session.	[]	[]
7. New member interests and expectations are identified at the orientation session.	[]	[]
8. We make a point of finding out why new members join so we can identify services and activities of particular interest to them.	[]	[]
9. We provide new members with a welcome package.	[]	[]
10. We report new members to the provincial and national offices immediately to ensure they receive information and access to services at all levels.	[]	[]

Subtotal score

Member integration and involvement

	yes	no
1. Our Association has a system in place for regular communication with new members during their first year, including periodic surveys to evaluate their integration and satisfaction.	[]	[]
2. We have designated contact people to stay in touch with new members in their first year to ensure that they feel welcome.	[]	[]
3. Our membership materials/orientation sessions outline a range of opportunities for involvement in the Association.	[]	[]
4. All members are welcome on Association committees.	[]	[]
5. We follow up on new member interests.	[]	[]
6. New committee Chairs are briefed on their role and given techniques for securing member involvement on their committees.	[]	[]
7. New representatives of long-term member companies are treated as new members in terms of encouraging their involvement.	[]	[]
8. We provide realistic estimates of the time and effort required for volunteer activities.	[]	[]
9. We ensure that members are provided with leadership opportunities.	[]	[]
10. We give recognition to all members who contribute to Association activities.	[]	[]

Subtotal score

Renewal process

	yes	no
1. Our Association has an established process for communicating with members who are up for renewal.	[]	[]
2. We begin notifying members 60 to 90 days prior to the lapse of membership.	[]	[]
3. We include a letter or brochure describing "what you got/get for your membership fees" with the notification.	[]	[]
4. After the first year, we notify the original sponsor that an individual is up for renewal and encourage his/her assistance in securing the renewal.	[]	[]
5. Members who fail to renew are contacted personally to discuss their decision.	[]	[]
6. We attempt to conduct exit surveys on everyone who leaves our Association.	[]	[]
7. We evaluate non-renewals regularly to determine how we might improve our retention rate.	[]	[]
8. Members involved in renewal and retention activities are recognized in the same manner as those working on recruiting new members.	[]	[]
9. We place the names of definite non-renewing members on our prospect list for later contact.	[]	[]
10. Nobody leaves our Association without making a conscious choice—it never happens by accident.	[]	[]

Subtotal score _____

EVALUATING YOUR MEMBERSHIP DEVELOPMENT EFFORTS

Your score

To get your total score, count the "yes" answers in each category and add up the subtotals. The highest possible total score is 70 points.

61–70 Congratulations, you are doing an outstanding job!

51–60 Good performance—keep it up!

41–50 Solid foundation, but you probably need to strengthen a few areas.

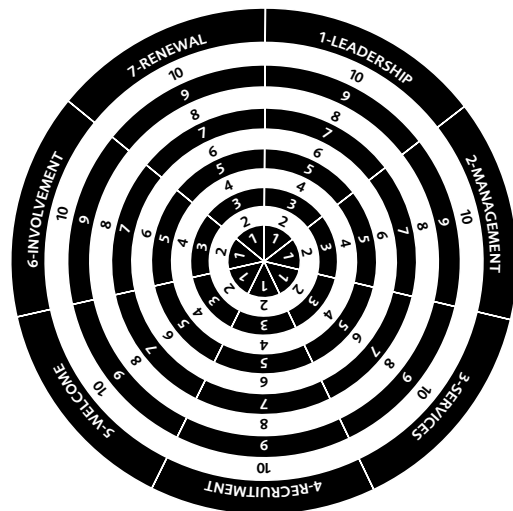
31–40 You are on the right track, but there is considerable room for improvement.

0–30 You have lots of work ahead of you. This guide is a good starting point.

Your analysis

To analyze your Association's efforts further, record your score for each category in the grid to the right by filling in each section with the number of "yes" answers you got in the survey. This will give you a graphic illustration of the balance between the various aspects of your membership development effort.

The grid also points out areas of strength and weakness in your Association. Any area with a score of eight or more is clearly a strong area. A score of less than six indicates an area where a more concerted effort would be beneficial.



Survey TWO

MEMBERSHIP DEVELOPMENT: IS IT A PRIORITY?

This informal survey will help you to determine the extent to which your Association has made membership development a priority. Your answers will provide an overview of your Association's current approach to securing new members, who are vital for an ongoing infusion of fresh ideas, expertise and experience.

The survey will also offer guidance on how you can improve membership development, by highlighting areas you need to consider when setting out your long-term recruitment and retention strategy.

"Yes" answers indicate areas where you are already strong. "No" answers show where there is still room for improvement.

A. When it comes to LEADERSHIP INVOLVEMENT, our Association has...

	yes	no
1. A President and Board of Directors who establish membership goals and orient elected officials and staff on their responsibilities to achieve these goals.	[]	[]
2. A President who highlights the importance of membership in their monthly newsletter column and at membership meetings.	[]	[]
3. Board members who participate actively in membership drives.	[]	[]
4. Board members who attend orientation sessions for new members and talk about the importance of getting involved in the Association.	[]	[]
5. Elected leaders who are actively involved in recognizing membership volunteers.	[]	[]
6. A Membership Committee that understands what the Association is about, at all levels, and can explain it to others.	[]	[]
7. A system to support and follow up with membership volunteers.	[]	[]
8. Committee chairs who actively encourage membership involvement and participation in their programs and activities.	[]	[]

B. When it comes to ATTITUDE, our Association has...

	yes	no
1. Committed leaders who encourage volunteers and are positive, so we can attain our membership goals.	[]	[]
2. A Membership Committee Chair who motivates others to get involved.	[]	[]
3. A Membership Committee Chair and/or President who will rally recruiters at the kick-off of membership drives.	[]	[]
4. A regular membership update in our Association newsletter.	[]	[]
5. The regular use of membership recruitment and retention slogans.	[]	[]
6. Good attendance at monthly meetings.	[]	[]
7. Good member participation in public events, such as home shows, parades of homes and charity projects.	[]	[]
8. Committed, enthusiastic involvement in all key activity areas, such as municipal liaison and education.	[]	[]

C. When it comes to COMMUNICATION, our Association has...

	yes	no
1. A supply of CHBA membership kits for ready distribution.	[]	[]
2. Recruitment materials promoting who we are at the local level.	[]	[]
3. A membership directory with information about the Association and a listing of all members.	[]	[]
4. An attractive display of Association materials in the reception area of our office (where appropriate).	[]	[]
5. A regular column on membership in our Association newsletter/magazine.	[]	[]
6. An insert for distribution with renewal notices describing recent Association activities and achievements at all levels.	[]	[]
7. Regular print or electronic mailings to all members on Association actions, priorities and achievements at all levels.	[]	[]

D. When it comes to RECOGNITION, our Association has...

	yes	no
1. Member certificates for new members.	[]	[]
2. A system for updating existing member certificates.	[]	[]
3. A system for publicizing the names of new members.	[]	[]
4. A system for publicizing the names of all current members (e.g. membership directory).	[]	[]
5. A special program to recognize recruitment efforts, such as the Rooftop Club.	[]	[]
6. Regular expression of appreciation for all volunteers: in our newsletter, at dinner meetings and so on.	[]	[]
7. A "Hall of Fame" to recognize long-term contributions by members.	[]	[]
8. Awards programs to honour our members' contributions to the Association and the industry.	[]	[]
9. Regular submissions for provincial and national Association awards programs.	[]	[]

E. When it comes to ENTHUSIASM, our Association has...

	yes	no
1. An upbeat theme and activities for membership campaigns.	[]	[]
2. A team approach to membership drives among elected officials, members and staff.	[]	[]
3. A team of volunteers to support a thorough approach to membership development.	[]	[]
4. Challenges to generate enthusiasm and excitement, e.g. between leaders and/or members.	[]	[]
5. Special kick-off events for membership drives.	[]	[]

F. When it comes to MEMBERSHIP REINFORCEMENT, our Association has...

	yes	no
1. Regular mention of membership at board meetings, committee meetings and monthly dinner meetings.	[]	[]
2. Recognition of membership volunteer contributions by the President or Membership Committee Chair, where appropriate.	[]	[]
3. Regular encouragement at meetings for all members to identify and enlist potential members.	[]	[]
4. Articles, stories or items on membership in each newsletter.	[]	[]
5. A positive attitude. If we fail, we learn from our mistakes and keep on trying until we get it right.	[]	[]

3 Planning For Membership Development

It is a fact of life that your Association's membership will always be changing. New companies will join, as others leave for a variety of reasons. You will always have to recruit members, and you will always have to work to keep the ones you have.

The most successful organizations treat membership development as a "system". They take a holistic approach. Knowing that the desired outcome is long-term members who are engaged and involved, they design their plans to optimize this result. Every aspect of membership, from recruitment to renewal, is carefully considered and designed as part of a member's overall experience.

In fact, one expert on associations talks about the membership "machine"—i.e. a system that keeps on working, once you have it up and running. And like any other machine, it requires ongoing monitoring, regular maintenance and the occasional overhaul.¹

Principles of Planning

Developing a strong and stable body of members takes a considered and consistent approach based on a number of principles.

Membership Development Must Be a Leadership Priority

The direction and inspiration for membership development has to come from the top. Your Association's long-term or strategic plan should include membership development and set overall objectives that are actively supported by all elected officials. (See "Strategic Framework", page 5.)

People like and need measurable targets. The targets have to be realistic and attainable, but not too low, or else they lack meaning.

Set Clear Membership Goals

The leadership of the Association, in consultation with staff and the Chair of the Membership Committee, should set annual membership goals. Consider all relevant factors to help you arrive at realistic figures that are based on past history, Association priorities and resources, current market share and potential, current economic climate, and so on.

Establish separate goals for recruitment and retention. Your first priority should be retention. Always aim to increase your rate, particularly if it is below 90%. Consider a separate goal for first-year member renewals, as the cancellation rate is typically higher among new members.

Develop a Written Plan

It is crucial to have a detailed annual action plan that describes the activities and tools you will use to reach your objectives. The plan should be in writing and encompass all steps in the membership cycle—not just recruitment and renewal, but also specific items for member orientation and integration. In short, the plan is a "blueprint for the member experience".

Designate Resources

Whether you plan to spend a lot of money or a little, prepare a detailed budget so you know what you need and how your dollars can best be allocated. Consider both the financial and human resources needed to put the plan into action. Include the cost of all the tools of

¹ *The Membership Machine*, Belinda Busoli (2005)

Membership development is an investment in the Association and must be accounted for in the Association's budget.

membership development, such as promotional materials, complimentary guest dinners, mailing costs, orientation packages and volunteer training sessions, to mention a few typical expenses.

Also think about the return on your investment. How many new memberships is a specific activity likely to generate? What would be the cost to recruit each new member? Once they join, what does it cost to serve a member on an annual basis? Non-profit organizations have to strive for a realistic balance between the cost of recruiting and serving members on the one hand, and membership fees on the other.

Share The Work

Membership development should not fall to a few dedicated members only, or you risk burning out your best recruiters. As much as possible, get others involved. Share the responsibility among leaders, staff and members.

- Leaders set the policy and the tone for membership development, and they also play an important role in making members, new and long-term, feel welcome and a valued part of the organization.
- Staff prepare materials and look after follow-up and administration related to membership development.

Keep in mind that staff influence the decision to join and particularly to renew. Staff are often seen as the face and voice of the Association to members—the people that

members interact with when they need information or assistance. Every contact with staff can reinforce the value of membership or contribute to a negative opinion of the Association.

- The participation of the entire membership is key. Successful membership development relies both on dedicated recruitment and retention volunteers and other members who help to enlist friends and peers and turn them into long-term members.

Train Your Volunteers

While some volunteers are naturals at recruiting and renewing members, all will benefit from a training workshop. Even those who are highly successful can still learn a few things.

Effective communication techniques include how to ask the right questions about prospective members' business challenges and interests, how to listen properly and how to present the benefits of membership in terms that are relevant to individual companies. These are skills that volunteers can also apply to their own professional life.

You may want to distinguish between volunteers who bring new members in and those who play a role in helping members to integrate and stay for the long term. Some Associations develop "ambassador" or "mentor" programs for first-year members (see "A Mentoring Program", page 79).

Communicate

Share your goals and plans with everyone involved directly in membership development, so they have a strong sense of ownership. Update your members regularly on the results.

Share your successes, as well as shortcomings in reaching your goals, and motivate them to do their part for membership development.

Be Enthusiastic

Enthusiasm, a positive attitude, pride in the Association—these are fundamental ingredients for success. Enthusiastic Membership Committee Chairs inspire their committee members and volunteers. Supportive HBA Presidents instill pride and resolve in their members. Proud and enthusiastic members welcome new members warmly and spread the word in their own business network—“Membership makes a difference”.

Measure and Evaluate Regularly

All plans should be reviewed and assessed at regular intervals. Is the Association on track to meet its goals? How is your performance to date compared to the previous year? What is working and what may need improvement? Be prepared to adjust your plans or change them if they are not bringing you the desired results. On the other hand, don't give up just because you weren't successful the first time around. Instead, determine what you can learn from your experiences and do it better next time.

A Member-Friendly Approach

When you are formulating your plans, look at membership development from your members' viewpoint as well as an organizational perspective. Map out the membership experience—how does membership actually work for your members, what is the experience? Where can you improve on your systems and approaches to increase the quality of their experience?

A member-friendly approach means planning for the member experience as a whole, with the objective being to create a smooth transition from prospect to long-term member for everyone who joins.

There are three distinct phases of membership development:

1. Recruitment
2. The first year of membership
3. Subsequent years

Recruitment

Recruitment is a main element in Association membership development—getting new members to replace those who have left, or for growth.

From a local HBA perspective, membership recruitment is tangible and concrete. A lot of effort and resources go into getting new members. The results are clear as the numbers always tell the story.

From a member's viewpoint, on the other hand, recruitment is simply a prelude to membership. Good recruitment practices prepare prospects for membership and help set their expectations, but the actual experience of membership doesn't begin until it has been determined that they meet the criteria and their membership has been approved.

The Membership Experience: The First Year

The first year is unique and pivotal. Members have to move from being the "new kid on the block" to "satisfied Association member" in a period of a year or less, sometimes considerably less. The better your Association can manage this process, the greater the likelihood of renewal.

A proactive and deliberate approach focused on creating a dynamic and positive first-year experience will take you a long way towards this goal.

The Membership Experience: The Next Years

Integration and involvement in the Association happen over time, not all in the first year.

While the first renewal is an important milestone in the member experience, you have to keep on demonstrating to members that you value their loyalty. You have to continue to show them the benefits of membership and provide an excellent member experience. And you need to continue to encourage them to become more engaged, for their own benefit and for the Association—leadership comes from experienced members.

Show that you care—about your members, their experiences as members of your organization and their satisfaction. People hold on to things that carry personal meaning for them. The more personal membership is, the more difficult it is to cancel it.

4 Recruitment: Ten Steps

When planning your recruitment program, take a systematic approach. It is suggested that local HBAs consider the following ten steps to successful recruitment.

1. Set your goals
2. Identify your prospects
3. Determine targets and priorities
4. Decide on recruitment activities
5. Determine your messages
6. Develop your supporting tools
7. Enlist and train recruiters
8. Follow up
9. Track, review and evaluate
10. Recognize recruitment volunteers

1. SET YOUR GOALS

Be optimistic, but realistic. Begin by reviewing the membership results for the past few years. How many new members did your HBA bring in? What's your renewal rate? How many new members will you have to recruit to stay even? Is it reasonable to aim for growth, even a modest increase over and above the previous year? Is membership growth an Association priority?

Track recruitment and retention over time. Compare performances year over year, look for trends, and determine if there were extraordinary circumstance at play to skewer your performance.

The goal should be within reasonable reach—challenging enough to push the Association forward, but achievable with effort. An overly optimistic goal will result in a sense of failure when it is not met.

Do a quick environmental scan. What's the current business environment? Is the marketplace stable? A lack of confidence or a sense of upcoming shifts in the marketplace can influence a company's decision to spend money and time on Association membership—they may hesitate to join, or be quicker to pull out. On the other hand, important local issues can be an impetus for companies to join.

Set up a schedule. Recruitment is a year-long, ongoing activity. Divide the overall recruitment goal into a number of smaller goals according to past experience and the activities you are planning. That way you can more easily monitor your progress and know if you are on track to meet your goals. If not, there may be time to make adjustments to the plans and get back on track.

2. IDENTIFY YOUR PROSPECTS

Develop an ongoing list of prospects.

Every local HBA should maintain a database or file of possible prospects (see "Identify Potential Members", page 39). Names can come from a number of sources:

- Existing members (usually the single largest source of prospects)
- Inquiries to the Association (telephone, e-mail, mail)
- Municipal building permits
- The *Yellow Pages*TM
- Newspaper articles and ads

- Home show/trade show booths and attendance registrations
- Attendees at training courses, seminars, workshops, forums and conferences
- Site visits (names on trucks and site signs)
- Building supply stores (contractors' business cards on bulletin boards, and similar)
- Lapsed members

Respond immediately to inquiries about membership that come to your Association by phone or e-mail. Consider it your first opportunity to demonstrate the professionalism of your organization. If people don't hear back from you in a timely fashion, you may not get a second chance to show prospective members that your Association is a well-run, member-oriented organization.

Ask members for leads. Nobody can promote the Association better than an enthusiastic and committed member, and most companies join at the invitation of other members. Every member should be encouraged to identify prospective members: What companies do they do business with? Who do they know that would value the services and activities of the Association and be interested in joining?

Members can be asked to follow up with their own leads, or they can provide the names to your Membership Committee. If the latter, make sure the lead is not waiting for a phone call that may not take place for several weeks or months, because their name went on the prospect list for an upcoming campaign.

Ask committees for leads. In the course of their volunteer work, members of various Association committees may encounter likely prospects—for instance, in government, industry and at public meetings. In this case, it may be more appropriate to leave the actual recruitment effort to others in the organization to avoid any possible perception that joint meetings are being used as a pressure point for membership.

Generate leads through your website.

Take advantage of your website to collect names of people who may be interested in joining. Ideas include "free items" that people have to register for, such as electronic bulletins or reports. You can also offer a preview of some of your services and activities, including special offers for short-term subscriptions to your membership publications, or an invitation to a workshop or seminar.

In each case, you will end up with a name and an e-mail address for your prospect list for follow-up. You may be able to find volunteers among your members to help with the work required to keep your site up-to-date.

Keep the prospect list current. Delete definite "nos", as well as those companies who join (remove their names as soon as they do, in order to avoid soliciting someone who just became a member). Whether you use a paper-based or electronic data collection system, note down every contact someone has with a prospect, and any observations that could be helpful for the next contact.

3. DETERMINE TARGETS AND PRIORITIES

Look at your membership by business activity. What is your current membership composition? Are there business categories or types that are underrepresented? Do local governments belong? Financial institutions, real estate agencies, and so on?

Keep in mind that the success of networking depends in part on having the right mixture of companies who can work and socialize together in the Association, while building their own network of business contacts.

One way to organize your prospect list is to divide it into several sections.

The A list is for promising leads—leads and referrals from members and people who have attended an Association event or program. These leads should be contacted as they are identified, not linger on a list for any length of time.

The B list is everyone else—companies that have been identified mainly through Association "research" (see previous page). They are prime candidates for periodic membership campaigns or blitzes.

Who will benefit most from your services and activities? Consider the strengths of your Association. For instance, if you have a strong education and training program, what non-member companies would value the workshops and seminars put on by the Association?

Keep targeting new home builders, renovators and developers. They are our core constituents and important to your HBA's credibility and clout with external audiences, such as governments and the media. They also help to attract members—the more core members, the more others will want to join.

The renovation sector is a potentially large growth area for many local HBAs. How many renovation companies belong currently? How many are there in your area? How many of them would benefit from membership, "fit" with your organization and add to its strength? The *RenoMark*[™] initiative to promote and distinguish renovation companies in the marketplace can be a powerful recruitment tool.

4. DECIDE ON RECRUITMENT ACTIVITIES

Evaluate past activities. What recruitment activities were the most successful and the least? Which ones did volunteers enjoy the most? Just as important, which activities were the most cost-effective? And involved the least amount of staff time? In HBAs with limited staff, this is a critical issue—time spent on recruitment is time taken away from member services and activities.

Determine the mix of activities and events. What will your action plan look like? For instance, how many special recruitment events should you organize, such as telephone or mail-out campaigns or information sessions, versus ongoing one-on-one recruitment?

- Be realistic about your resources. How easy will it be to get volunteers for your activities? How much staff time can be allocated? And what's your budget?
- Seek opportunities for personal contact. Large-scale impersonal activities such as mail-outs or advertising may arouse the curiosity of prospective members and get them thinking about membership, but personal contact is usually needed to get a final commitment from them.

Your colleagues across the country are some of your best resources for new ideas. Ask other local HBAs what has worked for them.

- Create activities to target specific business areas that are underrepresented in the Association. Tailor your approach to the specific audience.
- Develop a mix of activities—for instance, a key annual event for members to rally around, backed up by other activities throughout the year.
- Don't hesitate to try new approaches and events, if they seem reasonable or have worked well elsewhere. Trying new things can also help rejuvenate your recruiters and get them excited again.

Piggyback recruitment onto Association events and activities. Use Association events and activities to recruit new members. For instance:

- Invite non-member new home builders and developers to a special information meeting about your Association's priorities related to common industry issues such as regulatory barriers to new construction and encourage them to join forces with you.
- Encourage non-member renovators to join the Association by holding membership drives timed with upcoming Association events such as home shows and parades of renovations. Or hold information sessions to promote *RenoMark*[™] and membership in the Association.
- Target building product manufacturers, suppliers and installers when preparing for your annual home show.
- Promote your new home awards program to non-member builders and renovators and encourage them to become members so they can participate.
- Invite promising leads to attend a dinner meeting, join the golf tournament or other activity to meet people and take a close look at your Association.

(For more information, see "Suggested Recruitment Activities", page 44.)

Schedule the activities. A detailed schedule will help your organization to manage member recruitment effectively.

- Schedule all major events for the year.
- Allocate adequate time on either side of every event, for advance preparation and follow-up—be specific and detailed to eliminate time jams.
- Schedule the development of supportive tools, so they are available for events and activities as needed.
- Set firm times for training recruiters for specific campaigns, as well as for ongoing one-on-one contact.
- Choose timeslots for periodic review and evaluation (e.g. included on the agenda of the Membership Committee and the Board of Directors).

5. DETERMINE YOUR MESSAGES

What information are you presenting when recruiting new members, and how can you best customize your messages to reach a variety of audiences? Why should companies join? What will they get out of it?

Your Association will likely have both printed and online information for prospective members that highlights the benefits of membership, explains your services and activities, and touches on the priority areas that are particularly relevant to the industry in your community.

Those materials are of great value in supporting your recruitment efforts as handouts or mail-outs. They provide a quick overview or offer more detailed information about your Association, your services and activities, and the benefits of membership.

Often, though, the first contact with a prospective member takes place face to face, before they have had an opportunity to read any of your materials. Recruiters must be able to present the most important elements of membership to prospects with ease and confidence, in terms that are relevant and make business sense to the individual prospect.

Consider the following when developing your messages:

- You have to customize the messages. What do you know about a particular type or category of business? What are their concerns? The issues facing them in the marketplace? If you are not sure, ask current members to give you a thumbnail sketch of what's going on in their business area. (See "Prospective Members' Interests and Concerns", page 41.)
- Carefully consider the strengths of your Association. Are there certain services and activities that you are particularly engaged in or proud of? Specific recent accomplishments and successes that exemplify the value of membership?
- Ask new members what was the one thing or the most important factor that made them decide to join. Other companies will likely consider the same reasons compelling in their decision to join. Categorize by business activity—i.e. a key factor for a new home builder may not have the same significance for a building materials supplier.
- Ask long-term members what they enjoy most about being a member. What are the most valued aspects for their business and for themselves personally, and why?

- Develop a list of activities and benefits that best reflect your Association's offerings and what members believe to be the greatest strengths.

Use the list as the foundation for different tools and approaches. For instance, for generic brochures and flyers you may want to select "Ten great reasons to join our Association". For letters or other individual mailings, you may wish to focus on the top three to five reasons to belong, but tailored to the recipient (the five top reasons for a supplier will likely not be the same as for a renovator or new home builder.)

Be careful not to "overpromise" or set unrealistic expectations for benefits that the Association cannot deliver, e.g. increased business.

- For personal contact such as telephone calls or face-to-face encounters, choose three key messages only that best suit prospective members' business type and concerns, and begin with the most important (remember, you have to grab their attention quickly).

6. DEVELOP YOUR SUPPORTING TOOLS

Your Association is likely to use a range of materials in the course of trying to enlist new members, e.g. brochures, kits, flyers, posters, web pages and so on (see "Membership Information Package", page 47).

Good recruitment tools are important. Your materials don't have to be expensive to be effective, but they must be well written and attractive to reflect well on your organization and communicate your messages confidently. A poorly written brochure or a web page with spelling errors leaves a poor impression.

One of the key communication pieces is the letter that will accompany each membership information package.

The letter must be tailored to the recipient and should refer to any previous contact your organization may have had with the person, including specific points of discussion. The letter should demonstrate that the Association has a firm understanding of the business issues facing the recipient's type of company and that it offers solutions, action and benefits. (See "Suggested Letter", page 48.)

Some local HBAs have the in-house capacity and expertise required to develop information and marketing materials. Where this is not the case, there are several measures you can take to ensure that your materials are professional.

- Decide on the materials you'll need over the year, and put them in your written plan. A last-minute decision to do a quick brochure often results in a scramble and a marketing piece that is barely adequate.

- Draw on the expertise of your members. Ask volunteers to help write, review or manage the preparation of a brochure or other materials—chances are that some of your members may be working in the communication area and would welcome an opportunity to do something for the Association.
- Alternatively, hire a professional communications company. Allocate adequate funds in the Association's budget to cover all planned materials.
- They also need to know how to communicate effectively, to build rapport and confidence and to draw out other people. Even people who are "naturals" at recruitment may benefit from a better understanding of communication techniques. (See "Recruitment Tips", page 57.)
- Deliver the session as a team effort that includes the Chair of the Membership Committee, experienced recruiters and the Executive Officer.

7. ENLIST AND TRAIN RECRUITERS

Develop a group of volunteers. While all members should be encouraged to "think recruitment", a number of individual members can be enlisted as active recruiters. These people may or may not be part of the Membership Committee. (See "Profile of a Recruiter", page 55.)

Hold training sessions. To be successful, recruiters need to be given the right tools and information. (See "Recruitment Training Session Outline", page 56.)

- They need to be completely familiar with the services and activities at all three levels of the Association, and able to relate the benefits of membership in terms that matter to the individual prospect.
- They need to understand the interests and needs of various business groups and be able to discuss with them the advantages of membership.

8. FOLLOW UP

Establish a procedure for follow-up. Few companies will join on the very first contact with the Association, but lack of proper follow-up will undermine even the most successful initial contact.

In a fast-paced business world, people have come to expect prompt follow-up. Associations, like businesses, are judged on how well they live up to their promises—if you take too long, you lose credibility and they lose interest.

People want to be convinced before they commit, and they expect the Association to do the convincing. They may check your HBA out online or with a few colleagues but they will rely on you to follow through with them on the issue of membership and why they should join.

Develop clear guidelines for follow-up—when, how often and how. For instance:

1 to 5 days after first contact

Send a personalized follow-up letter or note with a membership information package.

Within a week after first follow-up

Make a brief phone call to see if the information was received, or if the prospect has questions or wants to talk.

Within the next month

Invite promising prospects to a dinner meeting, information session or similar event for an opportunity to meet members and get a sense of the Association.

Following days/week

Contact prospects who attended and invite them to join.

or

Contact prospects to find out why they did not attend and determine if they are still interested.

Subsequent weeks/months

Keep in touch with prospects. At every contact, give them a little more insight into the Association and the benefits they can enjoy as members. Keep every promise you might make, such as "We will contact you in a week."

Always under-promise and over-deliver—your aim is to create a very positive impression.

“Incremental Commitment”

Some prospects may be in no hurry to make up their minds about membership. While they don't reject the idea, they are also not ready to commit. You may be able to move them to a decision by keeping in touch, and slowly building their trust by demonstrating the value of membership—"Here is what you could enjoy if you belonged to the Association."

Start slowly by encouraging them to go to your Association's website and check out available resources. Put them on your mailing list for your magazine or newsletter for a limited time, or for member mailings. Invite them to take a closer look by participating in an Association event and make sure they have an opportunity to meet other members. At every contact, repeat your invitation to join and let them know of upcoming events or activities.

Determine who is responsible. Follow-up can be done by staff members or volunteers, or in many cases by a combination of both, as each party can take on specific tasks. Information mail-outs might best be done by staff, while volunteers can pursue personal follow-up—letters, phone calls and face-to-face meetings.

The Membership Committee Chair should designate volunteers for follow-up and help to coordinate joint follow-up with staff. The Chair should also be available for advice and be prepared to get involved when additional personal contact may make the difference in a prospect's decision to join.

Personalize your follow-up. People want to be recognized and respected as individuals, not be just another anonymous entity or potential source of revenue. Rather than "Dear Prospective Member", start your communication with "Hello Joe Smith". Instead of a generic message such as "In response to your request for more information about our Association, we are pleased to send you the enclosed package," make it personal: "I enjoyed our conversation yesterday and agree with you that one of the biggest challenges facing our industry at this moment is ..." (or similar).

Set a cut-off point for follow-up. It is important to persevere. It is also important to know when to stop and recognize that someone is simply not going to join at the moment, no matter what you say or do. There may be a host of different reasons for this that are not related to their perception of the Association or the recruiter's efforts, but to their ability to join at that particular time.

Determine a reasonable cut-off point—for instance, after five to eight contacts, or after six months of periodic contact. At that point, the prospect is ready for your "dormant file"—the list of companies to be contacted later on a limited basis, such as once a year. The purpose of an annual contact is to let the company know that you haven't forgotten them, and to motivate them to take another look at membership—perhaps now is the right time.

9. TRACK, REVIEW AND EVALUATE

On an ongoing basis, e.g. every two to four months, the Membership Committee should review the recruitment goals and progress to date, to make certain that the plan is working and the Association is meeting its projections.

The Board of Directors should be given a summary report of every review. If there are serious issues or concerns that recruitment is seriously off, they need to be discussed at the Board level. A shortfall in membership development affects the entire organization and its ability to function properly.

10. RECOGNIZE RECRUITMENT VOLUNTEERS

Volunteer recruiters play an important role in the Association, and their efforts should never go unnoticed. Most Associations have an established approach or program to recognize recruitment volunteers, including:

- publishing recruiters' names in newsletters and other Association communication venues
- acknowledging recruiters at dinner/ membership meetings
- a Rooftop Club created specifically to honour and celebrate recruiters
- presenting sponsors with a certificate or plaque for the office or company portfolio.

Incentives for Recruiters

In order to encourage recruitment and recognize the efforts of recruiters, local HBAs may wish to use incentives beyond those noted above. These can range from simple rewards to more elaborate competitions and programs. For instance:

- Have members sponsor or donate prizes as incentives—this can include products and services, or incentives paid by them (e.g. lunch or dinner at a good restaurant). This also provides exposure for the sponsors.
- Provide opportunities for all recruiters to win a prize. Consider a monthly or regular draw, where recruiters enter their names for each new member they bring in.
- Run competitions where the individual who brings in the most new members in a certain campaign or timeframe wins a trophy or an Association jacket, for instance.

Identify Potential MEMBERS

The residential construction industry is made up of a great variety of businesses that are involved in many different ways—some directly and others indirectly. Use this list to identify businesses in your community that may have an interest in joining your Association.

- Accounting and bookkeeping services
- Advertising and marketing
- Alarm and security systems—manufacturers, suppliers and installers
- Appliances—manufacturers and suppliers
- Appraisers
- Architects and draftspeople
- Asphalt—subcontractors and suppliers
- Audio-visual equipment and services
- Awnings—manufacturers and suppliers
- Bathroom accessories—manufacturers and suppliers
- Blinds—manufacturers and suppliers
- Blueprint services
- Bricks—manufacturers and suppliers
- Building materials—manufacturers and suppliers
- Building exterior cleaning services
- Cabinets—manufacturers, suppliers and installers
- Carpentry—trades
- Carpeting—manufacturers, suppliers and installers
- Caulking and sealants—manufacturers and contractors
- Ceiling fans—manufacturers and suppliers
- Ceramic/stone/marble—manufacturers, suppliers and installers
- Chimneys—suppliers and contractors
- Cleaning services
- Closet organizers and storage systems—suppliers
- Communication services
- Concrete materials/blocks/pre-cast—manufacturers, suppliers and contractors
- Condominium maintenance services
- Construction equipment—dealers
- Construction management services
- Consulting services
- Countertops—manufacturers and suppliers
- Damp proofing—manufacturers and suppliers
- Decking—manufacturers, suppliers and contractors
- Decorators and interior designers
- Design consultants
- Display systems—suppliers, designers and installers
- Doors—manufacturers and suppliers
- Drafting services
- Draperies—suppliers and installers
- Drywall—manufacturers, suppliers and contractors
- Electricians
- Electrical supply dealers
- Elevators—suppliers and contractors
- Energy consultants
- Engineered wood products—manufacturers and suppliers
- Engineers
- Environmental consultants
- Equipment rentals
- Excavation contractors
- Exterminator
- Fastening equipment manufacturers
- Federal government departments and agencies
- Fencing—suppliers and installers
- Fiberglass products—suppliers
- Fill—suppliers and haulers
- Financial services—banks, credit unions and mortgage companies
- Fire extinguishing equipment—suppliers and installers
- Fireplaces and stoves—manufacturers, suppliers and installers
- Firestop products—suppliers
- Flooring—manufacturers, suppliers and installers
- Floor systems—manufacturers, suppliers and installers
- Foundation contractors
- Framing contractors
- Furniture—manufacturers and suppliers
- Furniture leasing services
- Garage doors—manufacturers and installers
- Glass, mirrors and stained glass—manufacturers and suppliers
- Glass blocks—suppliers
- Graphic design services
- Gutters and downspouts—manufacturers and suppliers
- Hardware—manufacturers and retailers
- Hardwood floor and laminates—manufacturers, suppliers and installers
- Heating, ventilation and air conditioning—manufacturers, suppliers and contractors
- Home automation/electronics—manufacturers, suppliers and installers
- Home entertainment systems—manufacturers, suppliers and installers

Hot tubs—manufacturers and installers

Inspection services

Insulation—manufacturers, suppliers and contractors

Insurance—agents and companies

Irrigation systems—suppliers and installers

Landscaping planning and design—architects and designers

Landscaping materials/plants/accessories—suppliers and contractors

Legal services—lawyers and notaries

Lighting fixtures—suppliers

Log homes—manufacturers and builders

Lot and land clearing contractors

Lumber and wood suppliers

Marketing consultants

Masonry products—manufacturers, suppliers and contractors

Media—newspaper, radio and TV

Metal products—manufacturers and suppliers

Millwork suppliers

Ornamental metal work suppliers

Modular homes—manufacturers

Moving and storage companies

Municipal government representatives

New home warranty programs

Paint—manufacturers, suppliers and contractors

Patio covers, enclosure and furniture—suppliers

Paving and paving stones—suppliers and contractors

Photographers

Pipelines—contractors

Plumbing—manufacturers, suppliers and contractors

Ponds, water gardens and waterfalls—designers and installers

Porcelain repairs—service companies

Portable toilets—service companies

Prefabricated building components—manufacturers and suppliers

Printing services

Propane gas suppliers

Property management companies

Provincial government departments and agencies

Publishers

Radiant floor heating—manufacturers, suppliers and installers

Railings—suppliers and installers

Real estate services

Recycled products and materials—haulers and suppliers

Rental equipment and machinery service companies

Residential grading coordinators

Restaurants, hotels and meeting facilities

Restoration contractors

Road construction—contractors

Roofing products—manufacturers, suppliers and contractors

Safety equipment suppliers

Sand and gravel suppliers

Saunas and spas—manufacturers and suppliers

Septic systems—manufacturers, suppliers and contractors

Sidewalk contractors

Siding, soffits and eavestroughs—manufacturers, suppliers and installers

Signage—service companies

Skylights—manufacturers, suppliers and installers

Solar equipment—manufacturers, suppliers and installers

Software solutions—suppliers and services

Sound insulation services

Sprinkler systems—suppliers and installers

Stairs—manufacturers and suppliers

Steel, structural/reinforcing—suppliers

Stucco—manufacturers, suppliers and contractors

Surveyors

Sunrooms/solariums—manufacturers and suppliers

Swimming pools—manufacturers, suppliers and installers

Tax consultants

Technical consultants

Telephones—suppliers and services providers

Tools—manufacturers and suppliers

Topsoil suppliers

Trade shows—owners and managers

Tree services—contractors

Trenching subcontractors

Truss systems—manufacturers and suppliers

Tubs and showers—manufacturers and suppliers

Utilities

Vacuum systems—manufacturers and suppliers

Ventilation (fans and range hoods)—suppliers

Vehicle leasing companies

Video production—service companies

Wallpaper—manufacturers, suppliers and subcontractors

Water mains and sewers—contractors

Waterproofing contractors

Water conservation products—suppliers

Water purification and filtration—suppliers

Waste disposal—service companies

Wheelchair ramps and lifts—suppliers and installers

Windows—manufacturers and suppliers

Prospective Members' Interests and CONCERNS

The successful recruitment of a new member depends to a large extent on whether you can convince a prospective member that you understand what's important to THEIR company and that membership will provide benefits of direct value to THEM, helping them deal effectively with THEIR issues.

All business groups share a common interest in the health and prosperity of the residential construction industry, and therefore all members benefit from all Association activities and services, directly and indirectly.

In addition, each member category has unique interests and concerns. Recruiters should be knowledgeable about the main interests and concerns of various business groups and address them clearly, focusing on what's most relevant to a particular prospect.

For guidance, talk with current members and find out what issues are uppermost on their agenda, and how membership is making a difference to them.

Most importantly, when face to face with prospective members, LISTEN. What are they telling you about their specific interests and concerns? You can find out by telling them about Association activities you think they may be interested in and listening for their reaction. Or simply ASK what specific concerns they may have in their own business or what they consider the key issues for the industry. Always RESPOND by outlining what the Association is doing in regards to their particular interests and concerns.

Below are some suggestions for recruiters.

Category	Interests and concerns	Association services and activities
NEW HOME BUILDERS	<ul style="list-style-type: none"> • Municipal regulations, fees, taxation, approval processes, land availability • Codes and regulations • Technical development • Training and skills updating • Professionalism/credibility • Visibility and marketing • Market trends • Savings 	<ul style="list-style-type: none"> • Municipal liaison • Provincial and national liaison • Technical Research Committee • Workshops, seminars • Code of Ethics, Membership Criteria, CHBA Member Builder's Statement of Values and Commitments • Consumer campaigns and education, public relations, charities • Market research • Group benefits

Category	Interests and concerns	Association services and activities
RENOVATORS	<ul style="list-style-type: none"> • Underground economy • Professionalism/credibility • Training and skills updating • Codes and regulations • Technical development • Visibility and marketing • Savings 	<ul style="list-style-type: none"> • Local, provincial and national liaison • Code of Ethics, Membership Criteria, CHBA Member Builder's Statement of Values and Commitments, <i>RenoMark</i>TM • Workshops, seminars • Local, provincial and national liaison • Technical Research Committee • Consumer campaigns and education, public relations, charities, <i>RenoMark</i>TM • Group benefits
DEVELOPERS	<ul style="list-style-type: none"> • Municipal regulations, fees, taxation, approval processes, land availability • Professionalism/credibility • Codes and regulations • Technical development 	<ul style="list-style-type: none"> • Municipal liaison • Code of Ethics, Membership Criteria, CHBA Member Builder's Statement of Values and Commitments • Provincial and national liaison • Technical Research Committee
TRADE CONTRACTORS	<ul style="list-style-type: none"> • Business contacts • Codes and regulations • Technical developments • Savings 	<ul style="list-style-type: none"> • Dinner/membership meetings and other events; volunteering • Local, provincial and national liaison • Technical Research Committee • Group benefits
MANUFACTURERS	<ul style="list-style-type: none"> • Business contacts • Opportunities for joint ventures 	<ul style="list-style-type: none"> • Networking with new home builders and renovators: dinner/membership meetings and other events; volunteering • Consumer and charitable campaigns, demonstration projects, co-operative marketing

Category	Interests and concerns	Association services and activities
SUPPLIERS	<ul style="list-style-type: none"> • Business contacts, new home builders and renovators • Business contacts, consumers • Opportunities for joint ventures 	<ul style="list-style-type: none"> • Networking with new home builders and renovators: dinner/membership meetings and other events; volunteering • Consumer campaigns • Consumer and charitable campaigns, demonstration projects, co-operative marketing
FINANCIAL INSTITUTIONS	<ul style="list-style-type: none"> • Business contacts, new home builders and renovators • Business contacts, consumers • Opportunities for joint ventures 	<ul style="list-style-type: none"> • Dinner/membership meetings and other events; volunteering • Consumer campaigns • Consumer and charitable campaigns, demonstration projects, co-operative marketing
SERVICES AND ALLIED PROFESSIONALS	<ul style="list-style-type: none"> • Business contacts, new home builders and renovators • Business contacts, consumers • Savings 	<ul style="list-style-type: none"> • Dinner/membership meetings and other events; volunteering • Consumer campaigns • Group benefits

Suggested Recruitment **ACTIVITIES**

SPECIAL EVENTS

While recruitment is an ongoing activity, many associations designate special times of the year for membership drives. The following list describes some of the more effective activities that your Association might want to engage in.

1. Mail-out campaign with personal follow-up

Personal contact is crucial to recruiting new members. To be effective, mail-out campaigns should be targeted to a small and clearly defined audience and include personal follow-up.

Select the materials you send out carefully. They must be attention-getting, answer the question of "what's in it for me", leave the reader curious for more information, include a call to action (e.g. Why wait, call us today!) and tell the reader that you will be contacting them.

Suggestions for materials include an Association brochure, a newsletter, an invitation to a dinner meeting and a brief description of recent achievements at all three levels of the Association.

A word of caution: don't overwhelm prospective members with too much information at one time.

Divide your mailing list among your volunteers. They should follow up with telephone calls within a reasonable length of time.

2. Telephone campaign

Designate a time for a telephone membership drive—a day or series of days when volunteers can take turns manning the telephone.

Develop a prospect list and distribute names to your volunteers. To create excitement and friendly competition among the volunteers, consider assembling them in one place, such as your Association's office. Brief your volunteers thoroughly and provide them with a script for contacting prospects.

Do not expect to recruit new members in one phone call, although it happens sometimes. The objective of the drive is to generate interest in the Association and a desire to know more. Follow up by mailing information and, ideally, an invitation to attend an Association function. Follow through on all positive contacts.

3. Information events

Organize a formal information/recruitment event for the residential construction industry in your area. You may wish to attract a broad spectrum of businesses or focus on a particular segment only, such as new home builders and/or renovators.

Keep your agenda interesting and fast-paced. Focus on the benefits that are most relevant to your audience and illustrate through examples whenever possible. Keep your discussion of the Association's structure and organization brief. Ask committed and enthusiastic members to talk about what the Association has done for them.

Have application forms at the session for those who are ready to join immediately. For the rest of the participants, follow up with a phone call within the next few days. Ask for feedback on the session and if they have any questions about the Association, and ask them to join.

4. Special promotion at regular Association functions

A less formal approach to recruitment is to designate a regular function, such as a particular dinner meeting or established social event, as a recruitment event, and encourage each member to bring a prospect.

Participation in a regular Association function gives prospects a feel for the organization, its activities and its members. Plan your seating arrangements to allow prospects to meet as many members as possible, including elected officials.

5. Special Association events, such as home shows, parades of homes, consumer seminars and awards events

If possible, tie recruitment activities and efforts to high-profile Association events. The visibility and media coverage of an annual home awards program, for instance, demonstrate clearly the benefits of belonging to the Association. Differential pricing for exhibitors at Association home shows means significant savings for members—another big benefit.

ONGOING ACTIVITIES

6. Dinner/membership meetings

Make it a practice to invite prospective members to attend a dinner/membership meeting to encourage them to join.

7. Special Association industry events

Many local HBAs organize seminars or information evenings on topics of local and industry interest such as changes to municipal regulations or the building code. These events present a great opportunity to demonstrate the scope and reach of the Association's activities to non-members and members alike. Invite non-members to attend and make sure you have information about the Association and membership application forms on hand. Circulate an attendance sheet at the event so you can follow up with non-members afterwards.

8. Workshops and courses

It is vital for anyone working in today's competitive marketplace to keep up-to-date and continuously upgrade their professional skills and expertise. Your Association's workshops and courses offer real value for members.

Consider opening your educational events to non-members, with a differential price system for members and non-members.

Have Association information materials and application forms on hand and follow up with all non-members who attend.

9. Promotion and advertising

In some local newspapers, you may be able to announce upcoming Association functions at low or no cost. Include an invitation for non-members to attend, and/or a contact name and number for further information.

Advertising to promote specific Association events such as home shows, consumer seminars, and parades of new homes or renovations enables you to reach two audiences at the same time, namely consumers and non-members. These events provide a great opportunity for co-operative advertising; by sharing the cost, each participant gets exposure and profile for a reasonable price.

10. Community relations

Good community relations, including media relations, generate visibility and credibility for members and the Association, and increase consumer awareness and confidence. Both a recruitment and retention activity, community relations may boost the pride of existing members and create a desire to belong among non-members. You want non-members to ask themselves, "Can I afford not to belong?"

Send out regular news releases, develop a good relationship with the local media and be the number one resource in your community for information about housing. Work with your municipal government to improve the choice and affordability of housing in your community, and with local charities on fundraising activities.

11. Encourage your members to be recruiters

Without a doubt, the single most successful recruitment "tool" is your existing membership. Enthusiastic, committed and well-informed members are the best ambassadors for promoting the benefits of belonging to the Association.

Use the well-established Association theme "MEMBERSHIP MAKES A DIFFERENCE", or develop your own recruitment themes such as "EACH ONE BRING ONE". Encourage friendly competition to bring in new members and recognize recruitment efforts, e.g. with an announcement in Association publications or at a dinner meeting, or a thank-you gesture such as a certificate of appreciation.

12. And last, but not least, use your website as a recruitment tool

Properly designed, your website can be an eloquent sales tool for prospective members. Working 24/7, your website can provide information and impressions about your organization—who you are, what you do and the benefits of membership.

You don't have to tell the whole story. The most important thing is to make a strong enough impression that people want to contact you for more information.

Membership Information PACKAGE

The information package is the primary handout tool for recruiting new members. It can be mailed following telephone or e-mail inquiries, or handed to prospective members in face-to-face meetings. (For mail-out campaigns and unsolicited contacts, limit your information materials to a letter and/or brochure.)

Consider

- To the extent possible, every package should be customized. The content should be targeted to the specific type of company and personalized for the individual receiving it, with their name and reference to any pertinent information learned in previous contacts.
- Establish a process of mailing out a package within a set time following a request (e.g. 24 or 48 hours). Tell the person what to expect, and then deliver sooner—that makes a great first impression.
- Don't overdo it on the contents. Carefully choose the items that will most effectively convince the recipient that it is worthwhile to pursue the idea of joining the Association.
- Review your membership materials periodically. Be critical and honest—does it represent your Association well? Is it an attractive package—does it look good? Is the information clear, well written and compelling? Is it current?
- Ask a few members, new and longer-term, for their opinions—what would, or did, work for them? What makes a strong, positive impression upfront? What is better left out for the second or third contact?
- Go a step further and convene a focus group of member companies that are in the same business as those companies you want to target, to review and critique the package and to give you good ideas for improving it.

Suggestions for content

- A personalized letter, signed by the Membership Committee Chair, President or Vice-President, thanking the recipient for their interest and extending an invitation to join.
- A brief presentation of the benefits of membership, tailored to the type of company.
- Your Association's membership brochure or publication.
- National and provincial membership materials.
- Up to three testimonials from satisfied members in a similar business category. *
- A reminder to visit your website. This can be a separate piece or it can be mentioned in one of the other items. If your site is large, note the key areas to visit.
- Listing of group benefits for products and services, e.g. gas, insurance, office supplies (only for companies that would see this as a valuable reason to join).
- Application form.

* Never say anything good about yourself that you can get someone else to say for you. Ask members for testimonials for specific purposes, or on particular topics. The testimonials have to be genuine and honest—use them verbatim, or if you must edit them, get approval. Always include the member's name, or everybody will believe you made up the testimonial.

Suggested LETTER

Date

Company
Address

Dear (name)

Thank you for inquiring about membership in _____
(name of your Association).

Or: I am pleased to send you this information package on _____
(name of your Association) as promised (specify: e.g. in our recent discussion, when we last spoke).

Or if no inquiry or previous contact:

We would like to take this opportunity to invite you to become a member of _____
_____ (name of your Association).

We are an association of residential construction professionals who work together to strengthen our businesses and our industry, including new home builders, renovators, developers, trade contractors, manufacturers and suppliers, mortgage lenders, real estate agencies (add as appropriate).

Our Association (or repeat name) is a forum for companies like yours who want to be part of a dynamic organization that promotes the growth and prosperity of members and has a long successful history as the collective voice of the industry with government, media and consumers.

Membership offers many advantages. We would love to have an opportunity to show you the many other benefits that our members enjoy, including:

(Add a list of 3 to 5 major benefits, one or two lines for each, tailored to the recipient's main interests as evident from prior contact and/or the nature of their business.)

In this membership package you will find (list the items including the membership application form.)

Join us today and start enjoying the advantages of membership.

For more information, contact _____
(name, position and contact information).

Benefits of MEMBERSHIP

Promoting the value of belonging to the Association means translating the benefits of membership into terms that have meaning for the individual.

Services and activities	Benefits
STANDARDS AND PRACTICES (membership criteria and process, Code of Ethics, CHBA Member Builder's Statement of Values and Commitments)	"Being a member tells people that I am professional, solid and committed to good (ethical) business practices." "Membership sets me apart in the marketplace." "Membership gives me credibility and respect."
INFORMATION (news flashes, newsletters, magazines, bulletins, reports, presentations, etc.)	"I get information that will increase my effectiveness and bottom line." "I get timely updates on the latest developments so I can stay on top of my game." "The information is tailored to my needs." "I learn about new techniques and technologies." "I find out what my peers, competitors and suppliers are doing."
NETWORKING	"I make new business contacts." "I have opportunities to sell my services or products to more people." "I have opportunities for joint ventures that will enhance my business." "I have an opportunity to work with people I respect on issues and causes that affect our livelihood."
POLITICAL REPRESENTATION	"There is strength in numbers." "My Association speaks for me on important issues that affect the industry, our customers and our businesses." "My concerns are being acted on." "I can influence the environment that I work in."

Services and activities

Benefits

REPRESENTATION TO THE PUBLIC
(media relations, community involvement,
consumer education, etc.)

"My potential customers will be informed about the value of dealing with Association members."
"I will stand out from my (non-member) competitors."
"I have an opportunity to participate in activities to improve public perception of the industry and therefore of me and my company."
"I have an opportunity to get higher profile in my community."
"I have an opportunity to contribute to my community in a meaningful way."

MARKETING (consumer campaigns,
demonstration programs, etc.)

"I can connect with a greater number of potential customers."
"I have an opportunity to increase my sales."

(Fill in your own features and benefits using the categories below, or others)

EDUCATION AND TRAINING

DISCOUNT PROGRAMS

CAREER OPPORTUNITIES

Frequently Asked QUESTIONS

Being well prepared when recruiting can make the difference between gaining a new member and losing a prospect!

Your written materials tell potential members why they should join, and what they can expect as members of your Association. But in many situations—for instance, in a telephone campaign, at the home show or on the construction site—a prospective member will not have had the chance to see these materials. Even when they have, prospects may not read them in detail.

During discussions with potential members, whether on the telephone or face to face, it is wise to anticipate questions and be prepared to answer in a clear and informative manner.

Listed below are some of the most commonly asked questions and some suggested answers. Feel free to change any answer to suit your own style, or make up your own question-and-answer sheets and hand them out to recruiters.

What exactly is the (name of your local HBA)?

"We are a non-profit organization representing the residential construction industry. That is, we represent new home builders, community developers and home renovators along with manufacturers, suppliers and a host of other types of businesses and organizations that make up the industry.

"We are part of the Canadian Home Builders' Association that is based in Ottawa, which represents our industry from coast to coast."

What does your Association do?

"In a nutshell, our mandate is to help our members be successful in business. Our focus is to ensure that our members enjoy the best possible business environment and that they have access to the information, tools and opportunities that will help them grow and prosper.

"That means representing the industry to government on many fronts, from regulations to taxes, sometimes working closely with them for change, other times fighting to keep things as they are. It means providing learning opportunities for our members—workshops, courses and so on. We offer lots of opportunities for members to network and create business relationships—monthly meetings, social events, volunteer projects, etc. We also take an active role in the community. For instance, we put on seminars and open houses for consumers and get involved in community projects." (*Keep it brief, and select the most appropriate examples for a particular prospect.*)

Why should I join?

"It's good business. As a member of our Association, you will be able to benefit from a wide range of activities and services:

Standards and practices

Being a member speaks to your credibility, professionalism and commitment to doing business the right way.

Information

You can keep up-to-date with changes and developments in our industry, and the important issues that affect your bottom line.

Networking

You have an opportunity to meet, exchange ideas and do business with other people in the industry.

Education

You have access to workshops and seminars to improve your skills, knowledge and business expertise.

Political

Your interests are represented, as our Association works with all three levels of government to promote a business environment that allows you to conduct business effectively and profitably.

Public profile

A positive public perception means increased consumer confidence and differentiation in the marketplace.

Marketing

Through our consumer campaigns, you have an opportunity to connect with customers and increase your sales.

Group benefits

You get a chance to benefit from real savings on insurance, equipment and services.

"And finally, you will have an opportunity to get involved, and have an influence on your industry. The health of the residential construction industry is critical to profitability. As a member of our Association, you can contribute to the collective effort to keep the industry vital and strong, today and in the future."

Who are your members?

"Our Association represents many different professional and respected companies in our community. Our core constituents are new home builders, renovators and developers (*give approximate number if appropriate*). In addition, we have trades and subtrades, manufacturers and suppliers, financial institutions, representatives of local, provincial and federal governments, and a number of service companies (*such as _____*)."

What are some of the important activities you are currently engaged in?

"At the moment, we _____."
_____. "*(Provide a brief synopsis of the Association's activities on the national, provincial and local levels, stressing those that are particularly relevant to your prospect's needs and wants.)*"

What are the priorities of your Association?

"We are strongly committed to _____."
_____. "*(Provide a brief synopsis of the Association's priorities at the three levels, again stressing those that are particularly relevant to your prospect's needs and wants. Also explain the Association's mission.)*"

What is the relationship between your Association and the Canadian Home Builders' Association?

"The Canadian Home Builders' Association is one organization with three levels—local, provincial and national. When you join our local Association, you automatically become a member provincially and nationally, and you will enjoy the benefits of the services and activities at all three levels. For instance, we (*name of your local HBA*) represent our members' interests at the municipal level through our Municipal Liaison Committee on such issues as development cost charges (DCCs) and approval processes. Provincial and federal issues that affect our members and their clients are addressed by the provincial and national levels of the Association." (*Use examples of provincial and national activities that are relevant to your prospect, e.g. economic research, codes and standards, taxation and environmental issues.*)

My company is already a member of the Canadian Home Builders' Association in another local HBA. Do we have to pay full membership fees in each local HBA that we join?

"Yes, you do. It is Association policy. The Association is one organization with three levels—local, provincial and national. Every time a company joins the Association, it becomes a member at all three levels and receives the full benefit of the Association's efforts and activities at each of the three levels. Consequently, it is fair for a member to pay a full membership fee in each local HBA that they choose to join."

If I join, how much time would I have to commit?

"It is up to you to decide how much time you commit. We recommend that as a minimum you take the time to attend our dinner meetings regularly and read the information we send to you. We strongly suggest that you also attend some of our seminars and workshops, as well as social events. Even if you spent just a few more hours a month, you could get a lot more value out of your membership."

"Naturally, we would welcome any additional involvement. Your expertise in _____ would be a great asset to our organization. We know that our members are busy people and we always try to suit the task to their schedule."

Does the Association hold regular meetings?

"We hold one dinner meeting per month (or...) so our members can get together to network and learn what is going on in the industry and the Association. In addition, our committees—should you choose to join one—meet regularly."

Are there social or sporting events?

"Yes, we organize social events throughout the year (*name a few events*). Many of our members enjoy the opportunity to get together in a relaxed, fun atmosphere (*and to involve their companions and children*)."

Can I bring a guest to a meeting?

"Guests are always welcome to give them an impression of our Association and how they may benefit from becoming members. Just let us know in advance so that we may make the proper arrangements."

Can I send someone else from my company in my place?

"Definitely yes! Your membership entitles you to the full range of services. If you are unable to attend a meeting, someone else from your company can take your place and will be able to brief you later on the contents of the meeting."

Are membership fees tax deductible?

"Yes, membership fees are a legitimate business expense and are tax deductible."

What about group benefits?

"Yes, our Association offers group benefits in a number of areas (*be specific:* _____).

For some of our members, the savings can be significant."

How do I become a member?

"All you need to do is fill in the membership application form. When it has been approved, you are immediately a full-fledged member (explain the approval process and how long it takes). We will forward the information to the provincial and national Association offices."

Is it difficult to get approved?

"No, the requirements for membership are not onerous. Our Association represents companies that are reputable, committed to doing business the right way, and willing to adhere to our Code of Ethics on a voluntary basis. The application form will clarify those requirements. I suggest you take a look at the form and call me if you need clarification or have any questions."

(Briefly outline the approval process and timeframes.)

Profile of a RECRUITER

QUALIFICATIONS AND SKILLS

- Any member of the Association, from Past-President to the newest member
- Interested in membership development
- Enthusiastic about the Association
- Outgoing—enjoys talking with people
- Good listener who knows how to draw people out
- Well informed about Association services and activities at all three levels
- Good understanding of the local business environment
- Able to relate the benefits of membership
- Able to set realistic expectations for membership
- Persistent—does not give up at the first "I don't think so"
- Doesn't take rejection personally and sees objections as challenges
- Optimistic—if a potential member declines, it is "no" just for now
- Avoids "arm-twisting"

RESPONSIBILITIES AND TASKS

- Develops a list of prospects from business contacts
- Sets own recruitment goals
- Contacts individuals and companies on behalf of the Association
- Keeps notes on every contact and reports back to the Chair of the Membership Committee/Association staff
- Maintains contact with interested prospects
- Signs up new members
- Invites new members to attend their first Association function
- Attends orientation session with the new member
- Encourages new members to become involved
- Keeps in touch with new members periodically to check how they are enjoying membership
- Contacts first-year members at renewal time
- Offers ideas for activities and campaigns

TOOLS

- Prospect list/access to database of potential members
- Application form
- Local HBA membership materials
- National and provincial membership materials

SUPPORT

- Training session
- Back-up from the Membership Committee
- Follow-up from staff

Recruitment Training Session **OUTLINE**

AGENDA

1. **Welcome and introductions**
2. **Purpose of session**
 - Provide volunteers with effective recruitment knowledge and skills
3. **Our Association and what we do**
 - Overview of local, provincial and national activities, services and priorities
4. **Association membership development**
 - Philosophy (recruiting for quality, i.e. long-term members)
 - Recruitment and retention goals
 - Planned activities
5. **About the campaign/drive/blitz** (if the session is associated with a specific event)
 - When, where, how and goals
6. **Developing and prioritizing the list of prospects/leads**
 - Who is responsible—how and what
7. **What does it mean to be a member? What do members want?**
 - Open discussion to determine differences and similarities in member needs and benefits
8. **Overview of the one-on-one recruiting process** (telephone or face to face)
 - Introduction and establishing rapport
 - Determining the prospect's needs, wants and challenges
 - Presenting benefits of Association services and activities related to the prospect
 - Highlighting other services of professional and personal value
 - Inviting prospects to join, overcoming objections
 - Closing for membership/next contact
9. **Effective communication**
 - Personalize information
 - Listen
 - Be understanding
 - Ask probing questions
 - Be focused
 - Be brief
10. **Role playing**
11. **Questions and wrap-up**

Recruitment TIPS

HOW TO BE A SUCCESSFUL RECRUITER

1. **Before you contact a prospective member**
 - Get background information on the company from others, as appropriate
 - Check the company's website (if available)
2. **Introduce yourself and the Association**
 - Introduce yourself
 - Explain who you represent
 - Explain why you are calling/contacting the person
 - Establish rapport
3. **Focus on the prospect**
 - Listen carefully to the prospect
 - Determine the prospect's needs and wants (identify their "hot buttons")
 - Provide information on benefits and services (local, provincial and national) that relate to the prospect's needs and wants
 - Show empathy—Prospects need to believe that you understand their challenges, that you care and that Association membership can make a difference.
 - Deliver the message effectively—This is particularly important in telephone drives, where you have only a few seconds to get their attention and interest them in hearing more. Practice and fine-tune the presentation until it rolls smoothly off your tongue and you are comfortable with your message.
 - Be careful not to overwhelm prospective members with information—Focus on a few good reasons why they should join, rather than a long list.
 - Outline how the prospect can contribute to the Association and the industry—e.g. "Your experience in _____ would be a great asset, and we would love to have you join the _____ Committee."
4. **Highlight Association services and activities**
 - Outline other services and activities that relate to the prospect's professional and personal profile
 - Draw on your own (i.e. recruiter's) experience—"I joined because... and I have found that..."
5. **Invite the prospect to become a member**
 - Ask the prospect to join the Association
 - Respond to initial objections, if any
 - Restate your invitation to join
6. **Close the conversation**
 - Complete the membership application form with the prospect
 - Welcome the new member and extend an invitation to the next membership meeting
 - or
 - Leave a membership application form with the prospect
 - Set a time for further contact—e.g. determine when you will call back, or invite to the next meeting.
 - or
 - Mail out a membership information package
 - Follow up with a personal call

Overcoming OBJECTIONS

Sometimes prospects will express doubts about membership and hesitate to make the commitment to join your Association. Objections are a normal part of the recruitment process and often indicate an interest on the part of the prospects in learning more about "what is in it for me and my company—is membership for me?"

Below are examples of the most common objections and suggested answers to overcome them. These are suggested as guidelines only; change the answers to suit your own style and circumstances, and prepare your own answers to other objections that you experience frequently.

It costs too much.

Short version answer

"Where else can you find so many valuable services under one roof? You get information that is important to your business and can affect your profitability. Your interests are represented to local, provincial and federal governments. You share time, ideas and business intelligence with your peers. You get exposure to the marketplace and increased credibility with consumers—membership is a mark of your professionalism and commitment to strong business values and ethics.

"You get all of that PLUS discounts through group benefits on a number of items, and your membership fee is a deductible business expense for tax purposes."

Long version answer

"First of all, if you believe in the value of a strong dynamic industry that is a positive and respected force in the community and a strong proponent for professionalism and accountability to our customers, then you should belong. Membership is a mark of your professionalism

and commitment to strong business values and ethics. It tells people something important about you and your company, and it differentiates you from others.

"Membership is designed to help your business to prosper and grow, in many different ways. For instance, you will get news, information on the latest developments, and market intelligence—in a clear and concise manner from the experts in the field, and tailored specifically to your needs. You also get access to workshops, seminars and presentations on a whole range of issues.

"As a member of our Association, you can network with your peers and potential customers for your services and products on a regular basis—people who share your concerns and who are willing to share ideas and information. *(If applicable: "Our Association encourages members to do business with other members. As a member, you will have many opportunities to make business contacts." Elaborate as suitable.)*

"Your business interests are represented at the municipal, provincial and national levels, as we constantly strive to create an environment in which our members can operate profitably. *(Give examples, such as: "Did you know that the CHBA played a key role in the reduction in the rate of the GST?" Offer local examples as appropriate.)* As a member of our Association, you also have an opportunity to have a direct effect on the environment that you work in every day by joining one of our committees *(or participate in a working group, or... as appropriate).*

"Our Association also offers helpful services and group benefits in a number of areas (*be specific: group insurance plans, cellular phone time, car and truck rentals, etc.*). For some members, particularly small companies, this can be a significant benefit."

I'm too busy, and I don't have the time to benefit.

"We are especially looking for busy people like you. Our Association can keep you informed about the issues that are important to you and your business, in a concise manner suited to your needs. Our newsletter, magazine and website bring the latest developments and knowledge right to your doorstep, so to speak."

"Our dinner meetings take place once a month (or _____). For a small investment of time, you get relevant business information—we have great guest speakers who are experts in their field—and the opportunity to meet your peers and expand your network of business contacts, including prospective customers."

My company is too small.

"Many of our members represent small companies like yours. In fact, membership offers great benefits for small companies. Where else can you get such easy access to information, education, networking and group benefits?"

"Being a member also helps to increase your visibility in the community and your credibility with customers—important benefits for small companies that do not usually have the same resources to promote themselves as their larger competitors."

I joined before, but I didn't get any business.

"Membership offers opportunities to make new business contacts (*and we actively encourage members to do business with members*),

but it usually doesn't happen overnight. There are many opportunities within the Association to meet and develop relationships with other members. We have a program to help new members integrate into the Association, get involved with other members and enjoy the full benefits of membership as quickly as possible, including the potential for business relationships." (*Outline your welcome and orientation program, mentoring system and other activities designed to increase member involvement and satisfaction.*)

I am already a member of an association that represents my specific interests.

"As a member of our Association, you will have more than your interests represented—you will also be demonstrating your support for the industry as a whole and helping to improve your prospects for success. When the building industry is strong, everybody benefits—not only new home builders, renovators and developers, but also all other businesses and organizations related to the industry."

"You will gain valuable insight into the industry and the business environment that you work in—the latest technical developments, housing and market trends, economic forecasts and analyses, and legislative challenges and changes, to mention a few." (*Again, use the examples that are most relevant to the prospect.*)

Your Association doesn't meet my needs.

"Can you be specific? (*Listen for response.*) Are you aware that our Association also _____? (*Use examples that correspond with the prospect's needs.*) If you are concerned about your business and the industry, then our Association can easily help you."

5 The Membership Experience: The First Year

Once prospective members have been accepted into the Association, they are ready to experience membership.

OBJECTIVE

The objective for your Association is to ensure that the first year is positive and satisfying for new members, so they will renew their membership the following year.

Starting the first day and continuing throughout the year, you want new members to:

- feel welcome and at ease at all events
- be aware of or familiar with the Association's services, activities and programs and how to access them
- participate in events and take advantage of services
- develop relationships with other members
- get involved in committees, councils or work groups
- be convinced of the value of membership.

This doesn't just happen by itself. It takes the same deliberate effort to retain members as to recruit them. And everyone has a role to play—the leadership, staff, volunteers and the entire membership—in seeing new members successfully through the first year.

It is important to recognize that new members become committed and enthusiastic members at their own pace and in their own way. However, the Association can greatly influence and enhance the experience of each member through a retention program that stresses the following aspects of first-year membership:

- Welcome
- Orientation
- Integration
- Involvement
- Renewal

WELCOME

The purpose of a formalized welcome process is to create an effective entry into the Association. You want to thank new members for joining and immediately begin to create a sense of belonging.

As a rule, welcoming a new member happens as a series of activities during the first month, including some or most of the ones listed below.

- Immediately upon acceptance of an application, send a personalized thank-you letter, signed by the President of the Association. You may want to highlight the services and activities that the new member will be most interested in.

Treat new representatives of member companies as new members. Although the company may be a long-term member, a new representative may not be familiar with the Association or know your members.

- The letter can be accompanied by a welcome information package with more detailed, practical information about the Association (see page 76 for a list of suggested content). Alternatively, the package can be mailed out a week later in order to increase the number of initial contacts with new members. Or it can be handed out at the orientation session.

- Inform the provincial and national levels of the Association of new member registrations immediately. This will ensure that new members are added to the mailing and website listings right away and can start receiving the full benefits of membership at all levels as soon as they have joined.
- Follow the mailing of your welcome package with a telephone call within a week or so. This allows you to check that they have received it, and to double-check on their contact information. It is also an opportunity to see if they have any questions, to learn a little more about their expectations and to help them get going on using their membership (e.g. "While we are at it, can I sign you up for next month's membership meeting?").

The conversation doesn't have to be lengthy—five to ten minutes may often be enough. The message to new members is clear: you care and you are there to help them get the most out of their membership.

- Welcome new members in your newsletter and on your website, with a brief description of their products or services.
- Introduce new members at their first membership or dinner meeting.
- Offer new members an opportunity to do a small presentation (a couple of minutes) about their company's service or products at their first meeting, or at subsequent meetings when they have had an opportunity to get a better sense of the membership.

- Reserve seating for new members at tables with experienced members for their first meeting, or for several meetings if possible. Invite suppliers to sit with new home builders and renovators when feasible. This sends a strong message to new members that you value their decision to join and actively try to provide them with opportunities to establish business relationships.
- Make personal introductions to elected officials and other members.
- Arrange a special event for new members only, where new members can meet each other and be introduced to the Association's leadership, including chairs of committees and councils. There are many options—host a separate reception before a dinner meeting or organize an early breakfast meeting before work, for instance.

ORIENTATION

When members first join, they may know little about the Association or how to take advantage of their membership. One of the most effective ways to get new members off to a good start is to show them how to get the most out of their membership. This is best done as an orientation session, involving new members, staff and leadership.

No member who decides not to renew should ever have to say, "Oh, I didn't know you also did that. I wish someone had told me."

New members should be offered an orientation session within one or two months of joining.

- **The purpose** is to educate new members so they can get a better insight into the Association and know how to use the services and activities. At the same time, you can find out about individual new members' needs and interests so you can help them plug in where they can get the most benefit.
- **Schedule** a session at a time that is convenient for everyone. Some Associations hold orientation sessions before a dinner meeting or other membership event. The session should run between one and two hours—any longer and it may be difficult for people to commit the time.
- **Ask current members for input.** What information was most helpful when they first joined, and what was less relevant? What would they have liked to have known upfront that nobody told them?
- **Consider who will deliver the session.** The ideal is a team effort between the Chair of the Membership Committee, membership volunteers, the leadership of the Association and the Executive Officer (or other staff). Even a brief appearance by the President to greet new members and perhaps say a few words about the Association's current activities in key areas will signal the importance that your organization places on new members.
- **Balance the session** between the "descriptive" and the "practical". Provide an overview of the Association on all three levels, rather than a long explanation, with examples of current priorities, e.g. "The three biggest issues we are working on right now are...". Give a run-down of your calendar of events, key activities and services, and how to access them.
- **Discuss how to get the most out of membership.** Offer advice, hints and encouragement. As much as possible, tailor the information to the particular interests of your members. It will increase the relevance and hence the value of your information, and show that you care about them as individual members. Ask volunteers to relate their own experiences and what worked for them.
- **Get new members to talk** about their interest in the Association, why they joined, what they expect, and how they can see themselves participate. Discuss opportunities for involvement and encourage them to sign up.

- **Don't forget about the practical "stuff".** Make sure new members know who's who in the Association, both staff and the leadership, and who to contact when they have questions. Explain the Association member logo guidelines, how to access the member website, when and how they will receive news and information, and how to pay for services, products and events. Be detailed—for instance, how many dinner meetings a year, the timing of consumer campaigns, and the publishing schedule and number of issues of your magazine or newsletter. That way, members know what to expect, and they can plan ahead for participation.
- **Give each new member a package of Association information.** Include a questionnaire to obtain feedback on their interests and willingness to volunteer if you have not done so earlier. This also provides a perfect opportunity to call them back. (See "New Member Questionnaire", page 81.)
- **Follow up** with a personal phone call within a week. Get feedback—did people enjoy the session? Was it helpful? Do they have more questions or concerns? Make suggestions on how they can get involved, based on what you learned about them during the session.

FAQs from New Members

Do you know what new members in your Association ask about most often? Keep track, compile a list with answers and print them for your new member or orientation package. Here is a list of some of the questions that members ask frequently.

1. What publications do I receive?
2. How can the Association improve my bottom line?
3. How do I get involved in my specific segment of the industry (e.g. sales and marketing, multi-family, seniors housing, etc.)?
4. Am I invited to attend the Association's awards show, home show or monthly diner meetings?
5. How do I network with builders?
6. Does the Association make representations to government, and how can I get involved?
7. How does the Association help me understand and comply with new and changing regulations?
8. When and how do I renew my membership?
9. How do I get involved with a committee or task force?
10. Does the Association give recommendations to the public on new home builders and renovators?

INTEGRATION

Integration is key to retention. People who have a sense of belonging, use your services and participate in your activities are far more likely to renew their membership, provided they enjoy their experiences and see the value of them.

The more members feel they have a stake in the Association, the more loyal and committed they are.

Participation creates familiarity and comfort with the Association and with other members. It also creates a sense of ownership—members who are integrated feel part of the organization and see membership as an extension of their own business.

Integration will mean different things to different members. Obviously not everyone will make use of all your services or enjoy the same activities and events. Some will be active and highly visible; others may have a lower profile, but still value their membership just as much.

Indications that members are integrated include:

- They read Association information, in print and online.
- They attend regular functions, e.g. dinner meetings.
- They participate in social events.
- They attend workshops, seminars and other educational offerings.
- They buy Association products: clothing, publications, and so on.

- They communicate with your office by phone and e-mail.
- They take advantage of opportunities to promote themselves to members, e.g. advertising in Association newsletters and tabletop displays.
- They participate in the Association's home shows and awards programs.
- They volunteer for committees, events or projects.
- They sponsor Association events.
- They recruit new members.

Encourage and Track Integration

Your orientation process aims to provide new members with the knowledge and tools to use their membership to full advantage. How members use them is ultimately up to them.

The Association can help to speed up and facilitate integration by staying in touch with new members, tracking their progress and surveying them on their experience.

Set up a Tracking System

You can't monitor and evaluate what you don't know. In order to understand how your members, and particularly new ones, are using your services, you have to keep track.

- Have registration and/or sign-in sheets for all Association events.
- Get written feedback from volunteers on their contact with new members, i.e. new member profile, committee or project sign-up sheets and so on.
- Keep track of the number and nature of phone calls and e-mails; maintain a record of all contact.
- Note purchases of Association products.

Develop a Plan For Personal Contact

During the first year, it is a good idea to contact new members at regular intervals to see how they are doing and how well they are getting integrated.

Establish a process for contact with every new member: the number of contacts that the Association can reasonably manage, the nature of each contact (e.g. phone call, letter, e-mail and survey), what will be covered in each contact, who will make the contact and how follow-up will be handled. For instance:

- **A month** after the orientation session, make a personal phone call to ask about their experiences to date. Have they had an opportunity to use your services or take part in any events? If yes, what do they think? If no, why not? Remind them of upcoming events and invite them to attend. Encourage them to think about volunteering, if they haven't yet.
- **Six months** after they joined, send out a new member survey, in print or by e-mail (see suggested template, page 83). Follow up with a personal phone call to thank them for filling out the survey and to discuss their membership. If the survey indicates any problems, you still have six months to address them. The survey also demonstrates your interest in them and their membership, which in itself is a powerful and positive message: their opinion and member experience matter to you.

- **Ten months** into the first year, send out a notice of renewal along with a personal letter. Thank them for their membership and invite them to contact you if they have any questions or thoughts about the upcoming year.
- **Value-added contact throughout the year** includes personal notices of upcoming events and activities of particular interest to the member (e.g. a workshop), based on your database or member profile, or invitations to volunteer for projects that could benefit from the member's expertise. Use e-mail or phone calls.

Make It Easy for Members to Contact You

When it comes to contacting the Association, different members may have different preferences.

You need to be easily accessible to all members. They have to be able to reach you by phone, e-mail, fax, via your website or in person at the office.

Publicize all channels, so members know they have choices in how they communicate with you and always have a way of contacting you. Set clear policies for response time and make sure members understand the timeframes. That way, no one will feel they are being ignored or forgotten.

Go the Extra Step

Sometimes members, particularly new ones, need a little extra encouragement.

- Set up a telephone chain, with members calling other members to remind them of upcoming events and activities. This can be tailored to an individual activity so only those with a clear interest will be called.
- Have door prizes or draws at dinner meetings and special events. Ask member companies to make donations or sponsor events—this also creates visibility for them.
- Have a regular "New Member Profile" column in your newsletter or magazine, where you can feature one or more new companies in every issue. Post the profiles on your website, as appropriate.
- Whenever members call or e-mail with questions or concerns, make it a habit never to hang up without asking: "Is there anything else I can help you with?" Or, "Will you be coming to...(our next dinner meeting, the upcoming golf tournament, air quality workshop, etc.)?" Or, "Can I register you for...?" It shows members that you care, and it is an opportunity to sign them up for something they may otherwise have skipped.

"Re-orient" members

Consider extending the orientation program to second-year members and beyond. Once members have renewed their membership after their first year, invite them to participate in an orientation "refresher" session. Chances are they may not have picked up all the detailed information the first time, but after a year in the Association, they will be in a better position to ask in-depth questions and take note of things that may help them to get further benefit from their investment in membership.

INVOLVEMENT

Membership can be more than simply making use of the Association's services, attending events and generally feeling comfortable that it is worth the investment.

Every member has an opportunity to get more involved and participate more directly in the Association, usually by volunteering for committees, project or events, and by becoming part of the leadership.

Some choose to get involved because they believe it is their duty and privilege to give something back to the industry. Some enjoy the camaraderie and being part of a group. For others, it may be an opportunity to grow personally and professionally, and to hone their people and leadership skills.

There are many reasons to encourage greater member involvement.

Many hands make for lighter work. The more volunteers, the more the Association can accomplish and so provide even greater value to members. Involved members are also much more likely to feel satisfied with their membership experience, and as a result, your retention rate will go up.

However, there are challenges that local HBAs need to understand and overcome.

The Challenges

Getting members to volunteer is not easy. In most local HBAs, the lion's share of volunteering is done by a small percentage of members. These volunteers are often deeply

committed, take on more than one task and tend to be involved for a number of years. They are in many ways the backbone of the Association, and their contributions are significant.

- Many HBAs are concerned about volunteer burnout. Finding enough new volunteers to replace members who leave, often after many years of service, is an ongoing challenge.
- Most members, up to 90% of the membership, are content with simply making use of the Association's services in some fashion, probably attending certain events and generally knowing that their interests are being well represented. They enjoy their membership but their engagement is limited.
- Some members want more. They welcome opportunities to make an active contribution to the Association and are ideal candidates for leadership positions. However, even involved members are more difficult to keep engaged for the long term.

The biggest reason for this is that everyone is short of time, so people choose their "extracurricular" business involvements with great care.

- When members volunteer, it has to be worthwhile. There clearly has to be something in it for them, something that justifies their involvement and rewards their contributions.

What are the Benefits of Volunteering for Members?

The value of membership can be greatly enhanced when members get involved. It is up to the Association to explain the benefits of

involvement, keeping in mind that different members will look for different reasons why they should contribute time and effort to Association work.

- Core constituents (new home builders, renovators, developers)
 - develop closer relationships with peers (build alliances, partnerships, understand competitors)
 - get to know municipal staff, local bankers, real estate agents (improved business relationships)
 - influence the business environment (regulations, fees, processes, etc.) for common and personal benefit
- Suppliers, trades, etc.
 - find out/stay in touch with what matters to new home builders and renovators (business opportunities)
 - work together with new home builders and renovators on common causes (credibility, understanding of builders' issues and concerns)
 - opportunity to promote services and products (members buy from members)
- All members
 - make a positive contribution
 - give something back to the industry
 - have a finger on the pulse of the industry
 - break the ice and get to know other members
 - opportunity for community involvement and profile

- And for personal growth
 - learn or improve skills that can help them in their career (e.g. planning and running meetings or events, public speaking, giving presentations, negotiation, strategic planning)
 - gain confidence
 - increase profile and credibility
 - enhance their resume
 - make friends
 - have fun

Make It Easy to Volunteer

Don't expect members to contact you to find out how they can volunteer. Be proactive and tell them about opportunities and the benefits of volunteering—often, consistently and tailored to the individual member. Make sure they understand that every volunteer makes a valuable contribution to the Association and that every contribution, large or small, makes a difference.

- Once you know about a member's interests, experience and availability (identified during recruitment, at orientation sessions and through questionnaires), present them with a few choices for their consideration.
- Ask current volunteers to speak about their experiences—why they got involved and what they are getting out of their commitment. Testimonials work well, because people can relate to the experiences of others like themselves.
- Keep in mind that involvement is a gradual process. Many members may not be ready to volunteer when they first join. They may need time to figure out what the Association is all about and where they best fit in. Help them to do so.

Impact of Involvement on Member Satisfaction

A study by ASAE (the American Society of Association Executives) and the Center for Association Leadership Industry Research identified four different levels of involvement in non-profit associations.

Governance volunteers:	Serving on the board of the organization
Committee volunteers:	Serving on any type of committee
Ad hoc volunteers:	Participating in the value-adding work of the association by performing at least one task
Non-participants:	No involvement

Not surprisingly, the perception of the value of membership increases with the level of involvement. However, this can reach a point where those who govern the association are no longer in sync with the perceptions of the majority of members who are not involved. It is important for elected leaders to know if they are in step with the general membership, or if they, as leaders, have a privileged vantage point that they need to share through better and/or more frequent communication with the general membership.

Another interesting outcome of the study was that ad hoc volunteers place higher importance on networking and lower importance on the legislative and regulatory activities of an association than people in the other volunteer groups. Ad hoc volunteers may represent a larger segment of the membership than the other volunteer groups, but may not always get sufficient recognition compared to committee and leadership volunteers.

- Let members know that all committee meetings are open and encourage them to attend meetings to get a better understanding of the issues you are engaged in.
- Use task forces or working groups to deal with specific, time-limited issues or projects, under the auspices of your committees as appropriate. Once the particular item has been dealt with, the group can be dissolved.
- When possible, break volunteering activities into small tasks, with start and end dates, so members know precisely what they are in for, and that there is a limit to what they are expected to give.
- Use teleconferencing to cut down on the time required for meetings and decision-making. However, don't eliminate personal meetings entirely. Part of the value of volunteering comes from getting to know other members—something that requires face-to-face interaction at least some of the time.
- Consider "virtual volunteering". There is a wide range of tasks that members can do working at their computer at home or at the office, e.g. campaigning, gathering contact information, monitoring the news and researching elected government officials, to mention a few.

- Make it fun! Volunteers need to enjoy what they are doing while "doing good" for the Association, for their companies and for themselves.

Don't say that a volunteer task will take "very little of your time." Members can easily conclude that the task then has very little value.

What Volunteers Want to Know Before Committing

- What is the proposed task, and what I am expected to do? Explain what the task involves, what skills are required, and what kind of briefing or training they will receive in order to perform it successfully.
- What's the bigger picture? What will my contribution achieve? People want to know that they make a real difference. They also need to understand what they will be part of.
- Who will I report to, and who will be my contact person for questions and guidance?
- How much of my time will it take? Tell people how many hours they are expected to spend on Association work so they can make a realistic assessment: Can they take this on? What arrangements might they have to make at work or at home?
- How long will I have to commit for? Provide members with a timeframe. For instance, a committee position is for a one-year period minimally, and ideally for longer. If that is not suitable, suggest another volunteer task of shorter duration.
- Are there costs involved (e.g. parking, gas, meals, supplies), and will I be reimbursed?
- Who will I be working with? Networking matters, and the best volunteering opportunities let members make a valuable contribution to the Association while achieving their own business and personal goals at the same time.

(See "Working With Volunteers", page 84.)

Thank Your Volunteers

Always be quick to recognize the contributions of your volunteers, and particularly new members. There is nothing like a heartfelt thank-you or a gesture of appreciation to make people feel good about volunteering.

All contributions, large or small, should be recognized. Even a small effort reflects a gift of time by a member.

The level of recognition should be in keeping with the level of contribution. Not all contributions are equal. Always single out those volunteers who are especially deserving and offer separate thanks.

The elected leadership should have an active role in thanking volunteers, to reinforce the importance of member involvement. This can be done, for instance, as presentations at membership meetings or acknowledgements in newsletters.

Local, Provincial and National Recognition Programs

Most local HBAs have developed a system of member recognition, from dinner meeting announcements or presentations of certificates, trophies and gifts, to the distribution of news releases to the local media.

Many local HBAs also have established an annual awards program to honour the accomplishments of their members. These programs often take the form of celebratory events, such as special luncheons or festive gala evenings.

For the winners, the prestige of an Association award is a powerful sales tool for their company. For the Association, an awards program offers a unique opportunity to gather members in friendly competition to celebrate excellence, and it often generates media attention.

On the provincial and national levels, awards programs recognize outstanding contributions to the industry and the Association in many different areas, including housing technology,

education and training, marketing, fundraising and membership development. These awards are presented at the provincial and national conferences, celebrating the achievements of both individual members and local HBAs.

Local HBAs should seize the opportunities provided by the provincial and national programs to recognize members who have provided outstanding services to the industry and the Association. Nominate your members and publicize it to the general membership. Whether they win or not, being nominated is in itself a meaningful gesture of recognition that your members will greatly appreciate.

For instance, the CHBA Award of Honour recognizes outstanding service to the Association at the local level by a new home builder/renovator and by other members. It is easy to enter your members for these awards, and it is a way of giving recognition to members from the national level of the Association.

Be Creative and Personal

- With your member's permission, write a letter to their employer, describing the outstanding contribution the employee is making to the Association.
- Exceptional efforts deserve exceptional recognition. For instance, send out a news release to the local media if a member wins a prestigious award. Or if a single volunteer was the moving force behind an activity that benefits the community, issue a news release telling the story, e.g. "Local business person spearheads...."
- Instead of a generic certificate or trophy, personalize your gift of appreciation according to the volunteer's interests and preferences: e.g. a gift certificate to a restaurant, tickets to a sports event, a special book, and so on. This shows members that you know who they are, and that you are willing to take the time to select just the right thank-you for them.

RENEWAL

Renewal is a referendum on membership. If new members had a good first-year experience, they are very likely to renew. If not, they will be hesitant and may decide to let their membership lapse.

A few will not renew due to other circumstances—for instance, the company is moving elsewhere, it's merging with another member, or it's being discontinued. For others it is a personal decision—they are changing jobs or retiring, or they may have less time due to a growing family.

Still, for a number of members the decision to renew is based on their assessment of value for money. Did they get enough out of their membership? Is it worth continuing it?

Administration

Most local HBAs have a defined renewal process for contacting members as their membership is due to expire. It may be a good idea to differentiate between first-year members and the rest of your membership and give extra attention to those members who are making the decision for the first time.

The renewal process is usually handled by staff and/or member volunteers. Each local HBA will determine how long and complex the renewal effort should be, according to its size and resources.

- **Enlist and train retention volunteers.** Develop a group of members who are enthusiastic about membership, comfortable with people and knowledgeable about the Association's services, activities and priorities (see "Profile of a Renewal Volunteer", page 85).

Track Renewals

Even if your membership turnover is low, it is still important to know which companies you lose and why. For instance, if they are primarily first-year members, it tells you that you may have to work harder to get new members oriented and integrated. Or if the loss is spread out over the entire membership, it may indicate that you need to improve your services and activities.

- **Establish a pattern for renewal notice.** Begin notifying members well in advance, at least two months before their year is up. As suggested previously (page 65), consider sending a personal letter to first-year members with their renewal notice. If a member does not respond to the first notice, send additional monthly notices until the renewal date and for a few months past the expiry date. Your HBA by-laws determine a cut-off point beyond which companies are no longer considered members.
- **Check your contact information.** Keep an up-to-date record of your membership, electronic or otherwise. Don't lose members because your contact information is faulty. Take note of changes of address, telephone and fax numbers, and e-mail addresses, as well as the names of new representatives for long-standing member companies. (Mail addressed to a former employee may simply end up in the waste bin.)
- **Decide on inclusions with the renewal notice.** If you have taken an active approach to membership development throughout the year, and you have kept members informed about all Association activities and services, members should be aware of the benefits of membership and why they should renew. Limit inclusions to a few key items that can

be spread over several mailings. Items can also be posted on your website and referred to in your renewal notices. Suggestions include:

- A personal letter of thanks for membership in the previous year, signed by the President.
- Brief summary of Association accomplishments at the three levels in the past 12 months—i.e. a report card to members.
- Description of current Association priorities and an invitation to “help us achieve our goals”.
- Notification or reminder of any new or upcoming services and activities that your Association may have planned for the next year.

The sign-off on the Code of Ethics on the renewal form serves as a reminder of the values that members promise to adhere to.

- **Increase the urgency of your messages with subsequent notices.** Some HBAs find it effective to include phrases such as “YOUR MEMBERSHIP IS ABOUT TO EXPIRE”. Print the message on the note itself or an insert, not the envelope, to preserve privacy and confidentiality.
- **Consider personal contact.** You may want to call all new members as their first renewal date approaches. This gives you an opportunity to find out about their intention to renew, and to check again on their first-year experience. The call can be placed by the member's original sponsor, the Chair of the Membership Committee or by trained retention volunteers, including mentors or ambassadors.
- **Hold a renewal drive.** If you seek to improve your retention rate, consider a drive aimed at members whose renewal may be in jeopardy.

First-year Renewal Follow-up

So your new members seem to integrate well within their first year and your first-year member renewal rate is excellent. That's something to be proud of. It is also something you can learn from. Do you actually know what's behind your success, what's making the difference? Why not ask new members who are renewing their membership after the first year to tell you about their experience: what they have enjoyed, what contributes to their satisfaction with membership, and where the Association could improve.

There are a number of options for doing so: include a survey with each first-year renewal notice, conduct telephone interviews (follow a set list of questions to ensure consistency), or convene periodic focus groups for more in-depth insight in the first-year member experience.

- **Be persistent.** Before you give up on companies that are not remitting their renewal cheque, call them to find out why and if there is anything you can do to persuade them to renew. A call from your Association's leadership can sometimes make the difference—this demonstration of care and effort may sway a member's final decision.
- **After receiving the renewal cheque,** send a brief thank-you letter, signed by the President or Chair of the Membership Committee. As appropriate, use the opportunity to encourage renewing members to get involved or to thank them for their previous contributions.
- **Acknowledge every cancellation in writing.** Never let members leave unnoticed. Thank them for the membership, indicate your regret at losing their support, and assure them that you would be happy to have them reapply for membership anytime. Occasionally, the cancellation letter will even cause lapsed members to reconsider their decision.
- **Report cancellations to the provincial and national levels** of the Association as soon as possible to enable them to update their records.
- **Conduct exit surveys.** Use cancellations to gain insight into members' expectations and how you can better meet their needs. Ask cancelled members to fill out a survey (see page 86). Mailing the survey with a pre-paid, self-addressed envelope will increase the likelihood of a response. You can also make the survey available online.

Cancellations

Sometimes there is nothing you can do to retain a member—they simply do not want to renew. Try to learn from cancellations what you can do better.

- **First of all, understand that not every cancellation is a rejection.** Some members will leave the Association for reasons that have nothing to do with the organization or your services and your efforts to integrate them. They are leaving for personal reasons or for business reasons, and there is nothing you can do to change their minds. With members like that, make sure they leave on a positive note. Thank them for their membership and their contributions, and as appropriate, ask them to recommend the Association to companies and individuals within their own network.
- Even better, conduct a personal interview. Ask for the reasons for leaving the Association, their rating of member services and activities, and their suggestions for improvement. What would make them change their minds about renewing their membership? For even greater insight, consider holding periodic focus groups of lapsed members.

- **Review and assess your cancellations.**
Can you detect trends or common issues related to your cancellations? Do members leave for similar reasons? Are you losing a particular segment of the membership? Are the suggestions for improving the Association or the membership experience consistent? The answers to these questions offer valuable information for Association staff and leadership to fine-tune your membership strategies and plans.
- **Keep cancelled members in your records.**
Cancelled members can become prospective members. Contact them after a reasonable length of time (12 to 18 months) and invite them to rejoin.

New Member Information PACKAGE

For brand new members, there is a tremendous amount to find out and know about your Association. Try to avoid overwhelming them with too much information at any given time. When possible, stagger the information, even if it means an extra mailing or additional e-mails.

Below is a list of suggested information and materials that are helpful to new members immediately upon joining or soon thereafter. Much of it is practical, intended to get new members using the services and activities as quickly as possible.

- Welcome letter from the President
- Invitation to the next orientation or new member meeting
- Calendar of events
- Description of local HBA member services and benefits
- Materials from the CHBA
- Materials from the provincial HBA
- Information brochures from your own organization
- Copy of recent newsletter, magazine or other publication
- Description of governance structure and leadership positions (with names of current leaders)
- Staff contact (local, provincial and national)
- Opportunities for involvement—committees, councils, special events and projects
- Member directory
- Member logo usage information (e.g. directions to the members' area of the CHBA website)
- Group benefits information

Orientation Session **AGENDA**

1. Introductions

2. Brief overview

- One Association, three levels (local, provincial and national)
- Who are we? (What is our vision, mission and purpose? What do we stand for? Who are our members?)
- Structure of our Association (Board of Directors, councils, committees and staff)

3. Our priorities, activities and recent accomplishments

4. Benefits of membership

- Information
- Networking
- Political representation
- Public representation
- Education and training
- Marketing
- Group benefits
- Personal growth

5. Make the most of your membership

- Regular functions—dinner meetings, social and educational events, etc.
- Volunteering—benefits and opportunities

6. Marketing opportunities

7. Responsibilities of membership

- Code of Ethics
- CHBA Member Builder's Statement of Values and Commitment

8. Introduction to (other) staff and tour of facilities (if session is held in the Association office)

Networking Tips for New MEMBERS

To be provided to new members and discussed at the orientation session.

Tips to Enhance Your Networking Success

- Don't expect instant results. Be patient. Effective networking takes time, and then moves very quickly. Eventually you will get to know enough people that you will always be able to join a conversation comfortably—and win introductions to new people.
- Get involved where you have fun or can contribute the most, not necessarily where you think the customers are. Networking often works through indirect rather than direct process—you make contacts who will tell others about you.
- Be visible. If your company sponsors events or advertises in our publications or membership directory, you will increase your visibility. You can also achieve visibility through hard work and contributions of time and effort to the organization—and find yourself heading a committee or leading a special project.
- Relax and be sincere. People can quickly read any hidden agendas—especially if you are there to sell and you think they are there to buy. No problem being upfront about your business intents (most members join for that reason after all). But if you give the best you have got, and you offer either ideas or services of value to other members of the Association without hope of immediate return, you'll find more profitable business than you could ever imagine eventually coming your way.

A Mentoring PROGRAM

Consider establishing a mentoring program (also sometimes referred to as an ambassadors club or, less formally, a buddy system.)

With a mentoring program, all new members are paired up with experienced members who act as personal guides or hosts to help new members get into the swing of membership.

The purpose of doing this is to create a culture where members work closely with other members to create positive membership experiences, with the result being a dynamic Association that benefits from the best each member can bring to it.

Who:

Any member can become a mentor or ambassador, as long as they are willing and able to commit to the responsibilities and the time requirements involved. A mentor may not necessarily be the same person who recruited the new member.

The ideal candidates have outgoing personalities and enjoy assisting and connecting with people. They need to have enough membership experience and knowledge to be able to offer new members a thorough understanding of the Association, the benefits of membership and current issues on the Association's agenda. They should also be familiar with Association activities and services of special interest to the new member.

Mentoring could be a suitable role for past leaders who are looking to stay involved in the organization, but in a less demanding capacity.

What:

The main role of the mentor is to help new members integrate more quickly into the Association and so derive greater benefit from membership and be more likely to renew.

In the process, the mentor will encourage volunteer involvement and help new members find opportunities for volunteering that are rewarding for them individually, while also benefiting the Association.

How:

The key activities and responsibilities for mentors are:

- Working with new members to clarify their objectives for membership and developing a plan of action to achieve them.
- Acting as a host: accompanying the new member to various Association functions, introducing the member to others, creating opportunities for mingling and networking, providing salient business information about other members to facilitate business relationships.
- Being a source of information about the Association, with a clear understanding of what would be of greatest interest to a particular new member.
- Facilitating integration and involvement. Mentors call new members to remind them of upcoming meetings and events, to check periodically on their progress and impressions. They encourage new members to explore volunteering, committee work and opportunities for personal and professional growth.
- Being the new member's key contact for information and problem solving.

How long:

The mentor-new member relationship should be in force for the first full year of membership. Following this, "new" members (now a second-year experienced member) may themselves be ready and willing to become mentors.

Other considerations and thoughts

Creating a mentoring program is a serious commitment. To work as intended, the program must be well conceived, well managed and evaluated on an ongoing basis. The mentoring process can be mapped out and materials developed to explain it. The pairing of mentors and new members needs to be done with care.

In other words, a mentoring program takes time and effort, but the results can be well worth it.

One of the long-term benefits for Associations is the potential to enlarge the pool of potential leaders. Your Association depends on good, strong voluntary leadership. Leaders don't as a rule just emerge; rather, they are nurtured from the membership.

A mentor program is essentially a "nurturing program" aimed at creating involved members, increasing member participation which is the foundation for long-term commitment, and reducing member indifference, one of the main reasons for turnovers.

Members who are nurtured through their first year are well on their way towards the level of understanding, commitment and sustained enthusiasm that is required for strong and positive leadership.

A variation on the mentoring role

High-achieving members who run successful businesses have a lot to offer newcomers to the industry, not only about the Association but also how to reach personal and professional success. When these individuals are willing to share their knowledge and insight, it is a valuable experience for other members. A "mentorship breakfast with coffee and candid conversation", for instance, is an Association event that is likely to attract many of your members, including those who have belonged for a number of years.

New Member QUESTIONNAIRE

"Yes, I would like to get involved."

COMPANY NAME _____

CONTACT PERSON _____

Address _____

Tel _____ Fax _____ E-mail _____

1. CHECK THE CATEGORY THAT REPRESENTS YOUR BUSINESS

- Small-volume new home builder
- Medium-volume new home builder
- Large-volume new home builder
- Developer
- Renovator
- Manufacturer
- Supplier
- Subcontractor
- Other (specify) _____

2. RANK THE FOLLOWING REASONS FOR JOINING THE ASSOCIATION

(Please rank from 1 to 5 with 1 being the least important and 5 the most)

- Professional credibility
- Networking
- Information
- Education
- Representation
- Group benefits
- Other (please explain) _____

3. PLEASE INDICATE YOUR AREAS OF INTEREST WITHIN THE ASSOCIATION

- | | |
|---|--|
| <input type="checkbox"/> Technical | <input type="checkbox"/> Membership development |
| <input type="checkbox"/> Legislative | <input type="checkbox"/> Municipal liaison |
| <input type="checkbox"/> Education and training | <input type="checkbox"/> Social events |
| <input type="checkbox"/> Economic research | <input type="checkbox"/> Fundraising |
| <input type="checkbox"/> Sales and marketing | <input type="checkbox"/> Community/charitable projects |
| <input type="checkbox"/> Communication | |

Other (please explain) _____

4. ARE YOU INTERESTED IN SERVING ON A COMMITTEE?

Yes ___ No ___

If yes, indicate which committee, or area of interest. _____

5. ARE YOU INTERESTED IN VOLUNTEERING FOR SPECIAL EVENTS OR ACTIVITIES? (e.g. home show, award shows, community projects, etc.)

Yes ___ No ___

If yes, indicate types of events and what kinds of tasks you are interested in. _____

6. DO YOU HAVE SPECIFIC SKILLS OR AREAS OF INTERESTS FOR WHICH YOU WOULD BE WILLING TO VOLUNTEER?

(e.g. building codes, technical information, web work, writing/proofreading, etc.)

Yes ___ No ___

If yes, provide details. _____

7. ADDITIONAL COMMENTS OR SUGGESTIONS

New Member SURVEY

Dear (name),

It's been xxx months since you joined our Association.

We would like to check that you are happy with your membership so far. We would appreciate it if you could take a few minutes to answer the questions below and fax/mail/e-mail the survey back to us.

1. Have you received the following?

- Welcome package
- Newsletter/magazine (by mail)
- Notices of dinner meetings
- Others—continue list of items as appropriate*

2. Which of our services have you used? On a scale of 1 to 5, how useful were they to you, with 1 being the least useful and 5 the most? Enter a 0 for any you haven't used.

- Dinner/membership meetings
- Newsletter/magazine
- Training/seminars
- Others—continue list as appropriate*

3. Do you have any questions about your membership or the Association?

4. How would you rate your membership experience so far?

- Excellent Good Fair Poor

5. Do you have any suggestions how we can better meet the needs of new members?

6. How likely is it that you will continue with your membership when it is up for renewal?

- Definitely Likely Not likely Undecided

The contact information we have for you on our database is as follows below. Please review it and let us know if there are any changes to it.

Thank you for taking the time to fill out this survey. We strive to provide every one of our members with a satisfying membership experience. Your opinion is very important to us so we can continue to learn and improve our member services and activities.

Working With VOLUNTEERS

1. Define the task or issue clearly

- Explain objectives
- Give a job description
- Set parameters for the task
- Give background information
- Provide all other relevant information

2. Explain why you believe this person will be successful

- Personal and professional skills
- Personal interest
- Experience in the Association
- Opportunities for leadership involvement

3. Identify Association policies and procedures that relate to the task

- Association by-laws
- Association policies
- Functions and responsibilities of leadership, committees and/or staff

4. Identify resources

- People—staff and other volunteers
- Money
- Time
- Tools

5. Confirm their understanding and agreement

- Ask for questions from your volunteers
- Re-phrase their questions to make sure you have understood—then answer
- Check for understanding and agreement

6. Agree to a plan

- Provide a written work plan with tasks and schedule
- Determine a format and schedule for feedback
- Follow-up—Who? What? When?

Profile of a Renewal VOLUNTEER

Qualifications and skills

- Well informed about the activities and services of the Association at all three levels and able to relate the benefits of membership
- Enthusiastic about the Association
- Interested in membership development
- Active and involved—able to relate personal benefits and experiences
- Persistent—does not give up easily and sees objections as challenges
- Optimistic—if a potential member declines to renew, it is "no" just for now

Responsibilities and tasks

- Contacts by telephone and/or letter those individuals and companies who have not renewed
- Responds to the concerns or problems of the contacted members
- Notifies the Association of the outcome of the contact and makes recommendations for follow-up, if required
- Provides input to the Membership Committee and others, as appropriate, on existing activities and services
- Participates in renewal drives
- Conducts exit surveys of cancelled members
- Supports the Membership Committee with ideas for renewal activities and campaigns
- Makes certain that nobody leaves the Association without making a deliberate choice

Tools

- List of renewals
- Renewal forms
- Summary of recent accomplishments and current activities at all three levels of the Association
- Exit surveys

Support

- Training session
- Back-up from the Membership Committee
- Follow-up by staff

Exit SURVEY

Dear (name),

We deeply regret your decision not to renew your membership with our Association. Losing a member is not something we take lightly. As the organization representing an important industry in _____ (*name of your location*), we strive to provide the best services for our members. Understanding your decision is important to us so that we may continue our efforts to improve our services. Please fill in this survey and return it at your earliest convenience.

COMPANY NAME _____

CONTACT PERSON _____

Address _____

Tel _____ Fax _____ E-mail _____

1. **Type of business** (i.e. new home builder, renovator, developer, manufacturer, etc.)

2. **How long were you a member?** _____

3. **Reason you decided not to renew your membership with our Association:**

_____ Retired from the industry _____ Lacked the time to participate

_____ Relocated out of the area _____ Did not benefit my business

_____ Other (please explain) _____

4. **Did you attend monthly meetings?** Yes _____ No _____

Please elaborate. _____

5. **Did you join any committees?** Yes _____ No _____

If yes, identify which one(s). Please comment. _____

6. **Did you find our publications useful?** Yes _____ No _____

Please comment. _____

7. **Did you attend any workshops or educational seminars?** Yes ____ No ____
If yes, identify which one(s). Please comment. _____

8. **Did you participate in any group benefit programs?** Yes ____ No ____
(e.g. insurance, car rentals)
If yes, identify which one(s). Please comment. _____

9. **Did you feel welcome?** Yes ____ No ____
Please comment. _____

10. **Were you able to make your views known?** Yes ____ No ____
Please comment. _____

11. **How could we have improved our services and benefits for your business?**

12. **Would you reconsider becoming a member?** Yes ____ No ____
Why? _____

13. **Final comments.**

The _____ (name of your local HBA) thanks you for taking the time to fill out this survey.

6 The Membership Experience: The Second Year and Beyond

If the focus of the first year of membership is to introduce and integrate new members into the organization, the objective for the second and subsequent years is to increase members' sense of loyalty and belonging. "We are part of this group, membership is a natural extension of our business, and we are proud to say we belong."

Take Nothing for Granted

Member loyalty is never guaranteed. Nor is their satisfaction with their membership. Just because they renewed after the first year, and perhaps even told you how much they enjoy your organization, it doesn't mean that they will feel this way after their second and subsequent years.

You have to continue to provide them with a positive and valuable experience. That means being proactive, in tune with your members and always open to change and improvement.

Continue to Promote Your Services and Activities

Even after the first year or two, members may not fully know what to expect, or what's available to them. In fact, even long-term members may not be aware of everything the Association does.

It is important to keep on communicating the full scope of the Association's activities, and the benefits and opportunities for members. This also helps to dispel any misperceptions or false expectations.

Always deliver services with a view to exceeding members' expectations and enhancing their positive opinion of the Association.

Continue to Seek Members' Input

It is a good idea to conduct periodic surveys of members to find out if they remain satisfied with their membership, and if your services and activities still hit the mark and meet their needs.

Organizations are sometimes reluctant to seek input from members. If everything appears to be working smoothly, and nobody is complaining or asking for changes, why bother? Or risk creating dissatisfaction or demands for change?

Organizations that are member-oriented and committed to service excellence may ask different questions. What is on our members' minds? What can we do better for them? Are we truly providing them with the best possible services? How can we help them further?

Once you seek and receive input, the onus is on your Association to do something with it—to evaluate it, react to it or act on it. Make sure that the entire process is well planned to allow for articulate and realistic input from members. Consider the questions carefully. Position any survey as information gathering, not a commitment to changes suggested by a few people only. Share the results. Be prepared to act on ideas that make sense, increase the value of membership and are doable from a resource perspective.

Before You Survey

An article posted on the website of Association Xpertise Inc. (AXI) suggests that before you survey members or conduct any focus groups, you should consider the following three questions:

1. Do I have any idea what my members really expect and how important it is to them? Make a list of your activities and next to them write your members' expectations and the importance of the activities. Without this knowledge, you won't be able to deliver on expectations.
2. Is my organization willing to meet or exceed member expectations? Lack of commitment by the board or staff, lack of resources, or the belief that it is not possible to meet expectations may all be barriers that need to be overcome. The most important factors are goals and standards keyed to member expectations.
3. How well are we organized to deliver on member expectations? Role ambiguity and conflict, poor technology, poor controls and lack of teamwork are the greatest organizational barriers to the delivery of quality service. How does our organization stack up?

If you have any doubts about these questions, it is essential that you probe deeper to gain a better understanding of member expectations and your Association's commitment to service excellence, as well as your ability to deliver.

Continue to Track Members' Participation

Once members enter their second year, their patterns of participation may be somewhat established. For instance, they come to all dinner meetings, or only rarely. They or the company's staff attend the technical seminars, they are avid golfers who participate in your tournaments every year, and so on.

Any changes from these patterns may indicate a shift in their relationship with your Association. If they participate less over a period of time, you may slowly be losing them.

Make a point of periodically assessing members' use of your services and their interaction with the Association. Have someone make a

quick telephone call to "disappearing" members, e.g. "I have noticed we haven't seen you for a while, so I thought I would just call to remind you of the next dinner meeting...make sure we still have the right mailing information... see if you are OK...," or a similar simple reason.

As appropriate, ask the original sponsor of the member, someone on the Membership Committee or a special retention volunteer to make the contact.

Keep on Encouraging Volunteer Involvement

Experienced members are great assets to the Association. The more members who volunteer, the more activities the Association can take on without losing its effectiveness.

Some members jump into volunteer work the moment they join. Others hang back, wanting to get a better sense of the Association and where they may best fit in. Yet others, and they constitute the majority of members, decide they do not want to get involved.

But a year or two or three later, this may change. They are now experienced, they understand the Association and the issues much better, and they have likely formed relationships with some of the other members. Their personal circumstances may have changed and they may have more time available. Chances are that some members will be ready to join a committee or put in time on specific projects or events in their second and subsequent years.

DON'T FORGET TO ASK. Recognize that members, even long-term ones, usually have to be asked first. However, once they are involved, they are more likely to look actively for other volunteer opportunities.

Send out periodic requests for volunteers or, even better, take a little time for a personal one-on-one conversation. Over time, you may have developed a good sense of members' interests and skills. Use that as a springboard to turn longer-term members into active, involved members. Also listen for clues to the kinds of volunteering they may enjoy the most, and what is standing in their way.

Identify the Leaders of Tomorrow

Leadership is crucial to the ability of local HBAs to carry their mandate as the voice of the industry with governments, business, the media and the public in their community. In an ever more complex business environment, it takes strong leadership, well informed and well supported, to achieve the vision that is at the core of the Association.

Local HBAs need to be diligent in identifying possible leaders and encouraging them to stay and grow with the organization—members that can take the Association into the next decades with vision, commitment and experience.

7 Recommended Sources of Information

Recommended Sources of Information

Publications

Busoli, Belinda. *The Membership Machine: Your Guide to Effective Member Recruitment and Retention*. 2005.

Dalton, James and Dignam, Monica. *The Decision to Join: Research and Analysis from ASAE and the Center for Association Leadership*. 2007.

Levin, Mark. *Millennium Membership: How to Attract and Keep Members in the New Marketplace*. 2000.

Levin, Mark. *Retention Wars*. 2004.

Sirkin, Arlene Farber and McDermott, Michael. *Keeping Members*. 2001.

Websites

www.suefroggatt.com

Information, tips, hints, bulletins and more from Sue Froggatt, an expert in membership development.

www.axi.ca

Free resources (articles, tips, templates, etc.) for association boards and staff by Association Xpertise Inc., consultants to associations and non-profit organisations.

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