

# RECRUITMENT & RETENTION PLAN

Path to Successful Recruitment and Retention of Members

## Membership Development Plan

The majority of people involved with our organization define “membership development” as “the strategies used to recruit and retain members. Throughout our history, membership development has been a series of tasks with success or failure measured by the number of new or renewing members. While the raw numbers are relevant, the significance of the membership development process is much greater than the number of names in the database.

*“Membership development is a core process that impacts and is impacted by all program areas within the organization.”* The success of every publication, program, activity, and event in VVA depends, in some way, on a strong, informed, and active membership. Membership development is successful only if the organization’s mission, programs and leadership contribute to overall member satisfaction.

We would like to acknowledge Patricia A. Siegel, CAE and James S. Delizia, CAE for their publication *“Beyond Membership Marketing”* which contributed to developing an innovative plan for *“Membership Development.”* Special thanks to Linda Mansfield of Mansfield & Associates, Inc. who provided data to VVA by conducting the *“2003 Membership Research Survey.”*

*“This plan has been developed for your use by the VVA Membership Affairs Committee. The plan is based on many years of VVA leadership and management experience at the national, state council and chapter level. Please send any recommendations for changes or improvement to the VVA National Office, Attn: Membership Affairs.”*

## Background

VVA is an advocacy organization. Our credibility or influence are dependent on having a group of people (members) who form a visible, tangible interest group, who keep our issues alive and in the view of decision makers. Secondarily, we provide a forum for honor, remembrance, healing, reconciliation, and other forms of personal recognition of the Vietnam War experience.

VVA’s average annual growth rate since 1978 has been about 4% with membership reaching a plateau of 45,000 in 1998. After the AVVA split in 1999 membership declined to 41,000 in 2001 and remained flat through 2002. Since then, we have returned to an annual growth rate of 4% with membership reaching another plateau of 56,000 in 2006. An active national membership development program in the early to mid-1990s had become passive by the end of that decade, with VVA relying on self-motivated chapters

to do the majority (77%) of the recruiting. We are gradually restoring national emphasis on membership development. A factor that has most likely boosted interest in veteran's organizations is the change in the national mood following 9/11 and the war in Afghanistan and Iraq. Other factors in the increase of membership are that our generation is reaching the retirement age, the use of the Internet, new or updated membership materials, and better communication throughout VVA regarding improving member recruitment and retention.

We have established a performance baseline and key performance measures. With these measures in place, we are ready to develop an action plan to improve recruiting and retention. VVA recruitment of members has never been a problem; the fact that VVA has improved the means by which we deliver our message (Internet) has a lot to do with the steady increase in recruitment in the last few years. VVA needs to improve on the retention of members and address the reasons why a veteran leaves VVA. The 2003 VVA Membership Survey had non-renewed members targeted to determine why they left VVA and we had a 14.7% return rate from those former members with their responses. Those responses included numerous complaints pertaining to improper leadership, poorly conducted meetings or no meetings at all, improper or no reporting of meeting minutes or treasurer reports, no defined mission, no community based programs, and feeling un-welcome or not part of the "clique", so they moved on.

With those types of responses, the VVA Membership Affairs Committee presented the VVA Membership Development Plan in 2004 to help improve recruitment and retention. Through an effective membership development plan, the chapter will provide a better inducement to bring in new members and increase the level of satisfaction amongst the chapter membership. "Members join VVA because they expect value and members will stay if we deliver value."

## **Chapter 1: Planning for Membership Development**

Developing an active membership is the goal of every membership organization. Anything can be achieved with an active membership, an organization's greatest strength and its greatest potential lie within its membership. The focus of the chapter membership development plan is the development of not only the leadership, but also all members.

**1. Establish Membership Development Leadership Team:** To realize the preparation, design, implementation, and evaluation of the chapter's membership development plan, a chapter must establish a volunteer leadership team. Regardless of the chapter membership size, the key is finding the right leader or member to head up the team.

- Identify skills and talents required of the team
- Consider representation at all levels (leadership & members)
- Solicit team participants

- Designate team leader
- Keep chapter membership informed, educated, and trained on VVA and chapter operation
- Prepare plan (based on 3 to 5 year timeframe) and conduct team orientation

**2. Assess Potential for Membership Growth:** This assessment has a geographical factor involved, rural communities will require extended travel in some cases for participation in chapter events and usually the population is sparse. Larger cities have a definite advantage in the potential for membership growth and in areas to concentrate their membership efforts.

- Make assumptions regarding avenues for growth
- Identify potential members
- Compile statistics on growth/decline
- Seek access to the at large member roster from state council
- Review results of previous membership campaigns
- Monitor current totals and work on non-renewed members list

**3. Review the Chapter Mission, Goals, and Programs:** Evaluate your chapter's current/past mission, goals, and programs within your community or in comparison to the VVA National's endeavors.

- Review your chapter's vision and mission statements and whether they would influence veterans to join VVA; if the statements need to be improved, do it.
- Develop a list of general assumptions regarding chapter's strengths and areas for growth
- Brainstorm key concepts current and prospective members should know or believe about your chapter
- Review your chapter's community based programs or projects
- Review involvement with children in community – "VVA Veterans Against Drugs" or other programs
- Review whether your chapter is involved in the legislative process

## **Chapter 2: Principles of Successful Membership Development**

The initial membership development planning process has been accomplished with the selection of your leadership team, assessing the potential for membership growth and reviewing the chapter mission, goals, and programs. The membership development process depends on each individual member to help achieve its mission, and in most cases the mission can only be achieved when the chapter leadership and chapter members improve themselves in some way.

1. Management and Governance: Chapter leadership should heighten awareness amongst the membership pertaining to chapter business and VVA. Chapter leaders

should evaluate whether the chapter's culture invites membership development and member involvement:

- Regular scheduled meeting and BOD meeting planning
- Proper notice of meeting location & time
- Provide meeting agenda
- Insure proper record keeping procedures (Secretary & Treasurer)
- Develop or review chapter programs & projects
- Greet all members and provide acknowledgement to chapter members for their efforts
- Evaluate the content of chapter mailings and publications that are for the membership

2. Leadership Development: Members represent a vast pool of talented individuals, each bringing a unique set of skills, experience, and expertise to the chapter and the chapter leadership should encourage members to seek chapter leadership roles.

- Provide leadership guidelines for the chapter's officer duties (VVA Leadership Handbooks)
- Seek out possible candidates for chapter leadership roles
- Share knowledge on handling the chapter leadership duties which include planning, developing policy recommendations, general oversight, and ongoing evaluation of the chapter mission
- Provide or design simple templates for the agenda and recording minutes (handbooks provide examples on the agenda and meeting minutes) which will help the officer accomplish their task
- Treasurers should have access and knowledge of computers and some type of accounting background

3. Membership Development: The 2003 VVA Membership Survey noted the typical VVA member joins and retains their membership because they enjoy the camaraderie of their fellow veterans, they read "The VVA Veteran" and they think VVA is an effective organization. The meeting agendas include programs and projects which encompass the chapter mission and goals. Meetings that are centered on veterans, their families, and their communities are deemed worthwhile, thus easier for the chapter membership to embrace.

- Provide straightforward approach in conducting chapter business
- Establish environment for camaraderie to grow
- Chapter programs, projects and mission should be self-fulfilling for the membership
- New member involvement is encouraged and at a gradual pace to avoid overwhelming, overloading or causing burn out
- Establish a family orientated environment (AVVA members and other family members) within the chapter

- The chapter should acknowledge members for successes and avoid demoralization in unsuccessful ventures
- Member acquisition, involvement, and ultimate satisfaction

### **Chapter 3: Communication and Public Relations**

The membership development process has established the chapter's management and governance, leadership development, and membership development building blocks which are essentially the foundation for a strong VVA chapter. With the chapter mission and goals defined, the chapter structural aspects in place, the membership development process must convey that message to the chapter membership and the general public by every communication venue available.

1. How to Communicate with Your Members and the Public: The principal communication tools used by chapters are often the chapter newsletter which can be distributed by mail or the new electronic means (Internet e-mail) and/or a chapter web site. These communication tools provide exposure of the chapter to the general public and where there are eligible veterans who constitute prospective new members.

- Maintain viable communication with chapter membership
- A chapter newsletter is an important communication tool and source for updating chapter roster addresses from the returned mail
- Continual chapter updates can prevent problems and assist renewal process
- Establish a phone directory listing and monitor the official chapter phone line, plus provide a return call if necessary ASAP
- Use the Internet as a contact source through e-mail messages or web site posts
- Develop for distribution, or obtain from VVA promotional material on membership
- A member who is well-informed on VVA becomes a communication tool
- Establish media contacts as promotional or communication tools and use them to build chapter credibility or influence on veterans' issues with the public

2. Developing Better Visibility with the Public through Your Community Programs: While communication is necessary to provide better visibility with the public, the chapter programs, activities or events are the drawing cards or the real hook that will play a significant role in achieving public awareness. Community based programs enable your chapter to become a conduit for others to achieve their goals and help guide the members to use the programs as a tool to fulfill their expectations. These types of chapter endeavors can provide additional boost to the membership recruitment and retention efforts.

- Improve or evaluate your existing chapter community programs
- Readily embraced community programs could produce more monetary support from the public and make these programs self-supporting
- Develop programs on educating children on patriotism; the Vietnam War time period in history; drug and alcohol abuse

- Develop programs to assist in community rejuvenation and beautification
- Develop programs to assist all veterans and their families with benefits issues, homelessness, employment and transportation to VA
- Assist in community food drives, home repairs for the needy and disaster relief efforts

3. Developing Public Legislative Awareness within Your Community: One of the key ingredients for success is advocacy at the grassroots or chapter level. Advocacy is framing an issue and stating a position in unequivocal terms while attempting to convince, or influence, elected officials, members of the media, potential supporters, and allies. Advocacy is important, because without it argument and support for the causes of people or specific groups would go unheard and unheeded by those in position to make changes.

- Convey to the public that as a citizen elected officials at the local, state, and national level work for you
- Assist in voter registration and encourage everyone to vote
- Encourage the public to establish, nurture, and maintain personal relationships with elected officials at local, state, and national levels
- Establish coordinated communication methods to reach the public on legislative issues

4. Becoming an Influence on Veterans' Issues within Your Community: VVA has earned a well-deserved reputation as the premier advocate for our nations veterans on a number of issues: PTSD, Agent Orange exposure health consequences, assistance to disabled small business owners, and assured funding for the VA health care system. Work with other veterans' organizations and coalitions to define items of mutual importance and develop a base of support.

- Develop a legislative agenda for your chapter and a strategy to advocate your agenda
- Develop personal and friendly relationships with your legislator and his/her staff. The staffers are the "gate keepers" and the first line of defense for the members of Congress
- Be a source of reliable information: the value of an advocate to a legislator and staffers are his or her grassroots contacts
- Know the political process in your City, County, State Legislature, and U.S. Congress
- Know the key players: elected officials, key committee members, staffers who advise Congressperson on issues, government agency administrators, editors and reporters who cover veterans' issues
- Utilize the coordinated communication methods established to reach the public on veterans' issues

## **Chapter 4: Membership Development Stages**

The membership development process has established the chapter's communication lines, transformed the chapter from a stealth position within their community to a pivotal platform with chapter programs that provide higher visibility which can generate more acknowledgment from the public, initiated legislative awareness with the public, and formulated a procedure to become an influence on veterans' issues. The chapter is now ready to tackle the recruitment and retention of members.

1. Prospecting: This process is designed to help the chapter to realize the importance of focusing attention on identifying prospective members, consolidation of that information and the preparation needed to launch a prospective member campaign or membership drive.

- Search the Internet for veterans' web sites or talk lists (example: Marines, Togetherweserved.com) which are a conduit for veterans
- Identify related organizations or concentrations of prospective members; veterans service organizations, military bases, military retirement communities, military unit groups, vet centers, VA hospitals, place of employment, and veteran related publications
- Target eligible veterans (local government, police or firemen, newspaper or TV reporters) who are highly visible and/or respected in your community but who have not joined
- Design and prepare for distribution promotional one page flyer or copies of chapter newsletter on chapter programs, chapter accomplishments and other VVA membership or program material
- Target non-renewed (NPD) former members as prospects
- Identify highly visible locations or chapter events for recruiting efforts
- Consider incentives to members or associates who provide the most names of prospective members
- Create a stand-alone promotional display that explains the benefit of membership

2. Recruiting: This process is designed to actively pursue the prospective member list; the areas where veterans reside, visit or work to be focused on; types of promotional materials available; and key individuals or other related organizations compiled through the prospecting process. Use all the elements to invite prospects to become part of VVA.

- Provide recognition or incentives for members who are competitive in membership recruitment and retention (example: steak dinner to top recruiter or column on member's accomplishment)
- Give prospective members an opportunity to experience membership in VVA; free copies of newspaper and invites to Chapter Meetings

- Appeal to all segments of military service of the prospective members: branch of service; minority groups; those who served in Vietnam; and those who served at other duty location during the Vietnam War
- Encourage other organizations, businesses or individuals with web sites to add links to your chapter web site
- Be prepared to answer questions on the chapter's mission and goals or provide information to assist the veteran with VA benefits (referral to VVA Service Officers) or other VVA programs
- Take pride in your appearance: VVA or branch of service apparel
- Offer to deliver veterans' information on a continual basis by the Internet by seeking their E-mail address and exchange business cards for future contacts

3. Orienting: This process is designed to help members discover how to use VVA's camaraderie, programs, and family atmosphere to fulfill initial expectations, and achieve a sense of value or belonging.

- Recruit volunteers to make personal contact (in person, phone or e-mail) and conduct a one-on-one orientation to explain the vision, mission, and current priorities of the chapter and seek information on their reasons for joining VVA
- "Welcome" them to VVA and display a list of new members in chapter newsletter or post to chapter web site
- Don't be shy about putting pictures of new members in the chapter newsletter or on the chapter web site

4. Involving: This process is designed to help the chapter expand the opportunity for members to become involved and help members to meet their personal goals.

- Design and send a member satisfaction survey (via mail, fax, or E-mail) to all members every six (6) months or whatever timeframe designated by the chapter
- Generate a profile of each member to identify potential volunteers for various specific tasks
- Develop a "Wish List" of skills and talents needed by the chapter to fulfill specific tasks

5. Renewing: This process is designed to remind members to remit dues to extend their access to the chapter programs, camaraderie, and publications.

- Members need to be reminded of the value of their membership
- Messages delivered to members during the renewing stage are as important as messages delivered during the recruiting stage
- The timely reminder on renewals and the correct contact information are important
- Monitor member renewals through your chapter roster and develop a process to avoid non-renewed (NPD) member status. Few would dispute that VVA was formed by veterans seeking to achieve common goals based on the premise that

much more can be accomplished collectively than individually. A chapter can achieve greater productivity through team work and the membership development process can become the vehicle to help chapters develop their members' potential and achieve their goals. Each member makes a conscious choice to become part of VVA, through the payment of dues and much like an investor each member seeks to gain dividends from joining VVA.

**Conduct Periodic Evaluation of Membership Development Plan:** Every plan requires preventative maintenance or periodic evaluation to insure that each segment of the plan is operating effectively and achieving the desired results. The membership development process depends on a strong foundation composed of sound management and governance which is reinforced by leadership and membership development. With the chapter's structural integrity established, this sound footing affords the chapter membership the opportunity to pursue worthwhile programs or projects and become an influence within their community. The deliverance of the chapter's vision, goals or mission is a mainstay in accomplishing the chapter's outreach to the eligible veterans and the general public within their community. All of these factors need to be maintained, adjusted or improved on to keep the membership development process functioning properly.

**Conclusion on Recruitment and Retention:** Everyone is looking for the mysterious remedy for membership recruitment and retention. However the basic fundamentals already exist within reach of the membership and the membership development process provides guidance to enlighten the chapter to that fact. The majority of VVA chapters don't own a building with a big fancy VVA sign on it, they do meet at other veteran organization's buildings, public buildings, restaurants or even the VA in some cases, and this does not make our existence and value any less credible to the public or eligible veterans. The membership development process is geared to enhance the chapter's visibility; garner recognition through our community based programs or projects, and overcome any shortcomings with good old hard work for veterans. A chapter's lack of financial stability will understandably impact on a chapter's operational capabilities, but volunteers can do amazing things when they want to. Although the membership development process does not address fund raising in general, it could very well increase participation at chapter fund raising endeavors or encourage additional support from the public and every dollar helps.

**Appendix A: Self-assessment of Whether the Organizational Culture of Our VVA Chapter Invites Membership Development and Member Involvement**

Topic	No Problem	Usually, But Some Slippage	Major Improvement Needed
1. Have regular scheduled meeting?			
2. Provide notice of meeting location and time?			
3. Prior planning for content of BOD meetings?			
4. Provide meeting agenda?			
5. Have proper record keeping procedures (Secretary)?			
6. Have proper record keeping procedures (Treasurer)?			
7. Develop or review chapter programs & Projects?			
8. Greet all members and provide acknowledgement to chapter members for their positive contributions.			
9. Evaluate the content of chapter mailings and publications that are for the membership?			
10. Membership development talked about at chapter meetings?			
Other:			
Other:			

Date of this chapter self-assessment: MO: \_\_\_\_\_ DAY: \_\_\_\_ YEAR: \_\_\_\_\_

**Suggestion: Might be interesting to have each chapter officer do a chapter self-assessment and then compare results. Everybody doesn't have to agree and different perceptions may surface some things to talk about. The notion is straight talk and action that enhances membership development**

**Appendix C: Sample Draft Member Satisfaction Survey**

**Member Satisfaction Survey**

Date: \_\_\_\_\_  
(MM/DD/YYYY)

Name: (please print) \_\_\_\_\_  
(First) (Last)

Do you attend chapter meetings? ( ) Yes ( ) No  
If yes, how often do you attend? ( ) Monthly ( ) Six times a year ( ) Seldom  
If No, is it because of the date, time, location or lack of communication on when and where or another reason, please explain?

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Are these meetings productive? ( ) Yes ( ) No  
If No, how could the chapter improve the meetings?

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Does the chapter leadership communicate with the members? ( ) Yes ( ) No  
If No, how can they improve?

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Would you be willing to participate in Chapter Programs as volunteer? (List program/s)

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Thank you for your participation in this survey! **VVA Chapter Board of Directors**