

## Reviving and Revising Your Membership Program

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As you begin to outline your membership program and create a plan for change, draft an introductory statement that describes what membership is and why it is important to a nonprofit. Next describe the current membership program, categories, benefits, fees, along with a brief overview of membership over the last 3-5 years. Include data by category of membership and insights on changes and opportunities. This will become your yardstick for demonstrating progress in future reports. As you create the plan explain any goals that are not self-explanatory. Included should be the responsible person, specific timelines, and specific dollar goals that indicate the number of new members and income anticipated at each level. Other non monetary benefits and goals should also be indicated.

The following is a potential outline.

Definition - Membership is:

1. The first step in building the base of support for a nonprofit and an entree for those interested in your work.
2. A fee paid in order to receive specific benefits.
3. Not a contribution.
4. A way for organizations to attract people interested in an institution and educate them about the scope of the work and your importance to the community.
5. A means to introduce people to the organization and build relationships in the hope that they will become not only members but also donors.

### Member Benefits

Present your current benefits, describe what is typical, and present new member date and proposed categories, benefits, and fees. Include an explanation of the process used (or proposed) to determine new benefits.

Typical member benefits:

1. Free or reduce price admission or access to programs/services.
2. Discounts on products and sales
3. Publications
4. Invitations to special events. (Different events designed for specific categories of donors.)
5. First option enjoy unique periodic access - for members only.
6. Member premium (gifts for joining.)

### Refining Your Member Benefits

1. Review membership benefits and materials and revise these to address current needs, provide meaningful member services, and to broaden the member base for current future initiatives.
2. All board members should be invested and involved in the development process; however, not all board members will emerge as major gift solicitors. A board

## Reviving and Revising Your Membership Program

membership committee (that is not a standing committee) can be created to collect data and materials, review the membership program, and suggest changes and options. Interns, staff, and volunteers may also accomplish this work. The role of this committee is to:

- Gather high quality membership materials and information from staff-identified institutions.
  - Work with the staff to review and contrast findings, consider options, and develop suggestions for change.
  - Consider what people actually want and need not just what you can offer.
  - Suggest new audiences and population segments that align with strategic priorities and opportunities.
  - As appropriate, work with staff to develop and conduct telephone and on-line surveys to support data collection and review process.
3. Design benefits of value. If benefits are considered to be worth the fee they typically appeal to individual's needs to save money, save time, have special access or services, or be part of an elite or unique group. One of the most important reasons people become members is affiliation--because their friends have joined.
  4. Work with marketing professionals/consultants to create a membership marketing plan that builds on what have learned.

### Identifying the Audience and Potential Members

1. Identify your "warmest" prospects.
  - Create lists of lapsed members, former board members, etc.
  - Focus on former high-end members who have lapsed
  - Consider new categories that include those who use your services:
    - i. Teachers and Educators
    - ii. Scholars, history enthusiasts
    - iii. Community leaders
    - iv. Segments of the surrounding community: Young families, senior citizens, professionals, affluent groups, military or government employees, predominant type of religious institutions, ethnic groups, etc.
      1. How does your current/planned program match the interests of each group?
      2. What are the best strategies, marketing tools, and ideas for reaching each group?
      3. Do you have strong links or individual connections to leaders in these arenas?
2. Think broadly about the different age, ethnic, professional, religious, and other groups you would like to see playing a role in the institution.
3. When assessing what is needed and what changes are in order, include past members as appropriate in the discussion.

## Reviving and Revising Your Membership Program

- A survey of consistent and top tier members can be helpful as would a random review of lower level members. Be sure to look at similar organization beyond your local region.

### Successful Membership Strategies

#### 1. Direct mail

- Purchase or borrow lists from similar organizations.
- Target the warmest prospects for the most concentrated efforts.
  - i. These are lapsed members, former board members, recent recipients of services, former donors, etc.
- Determine key messages, plan mailings, and create timelines for direct mail campaign.

#### 2. Membership as Sales

- Make it easy to join.
- Take complaints seriously and seek solutions.
- Membership is sold by direct mail, through brochures placed in prominent places and most often at the points of entry and exit at an organization.
- Selling Membership requires trained staff that are adept at “selling membership” and attuned to best practices in visitor services.
- Employ sales strategies, set goals, and monitor progress—weekly, monthly, annually.
- Organizations can offer staff incentives for membership sales.
- Staff other than front-desk staff should be encouraged to contribute (as can board members) by submitting prospective member names to grow the mailing list.
  - i. They can add a personal note to individual mailings.
  - ii. They can be asked at specific time during each year to provide names of family, friends, colleagues, business associates.
  - iii. By tracking the number of names submitted by staff and board, you can appropriately recognized individuals for their role in expanding the member base and advancing the organization.
    1. Staff can be offered incentives for supplying names such as cash or time off.

#### 3. Strategically target groups. Rather than approach membership with a broad appeal, put your earliest and greatest efforts into the groups with whom you have some relationship.

- Work on the identified target groups. (Typically the best of these is lapsed members.)
- Create a strategic membership marketing plan that focuses on identified target groups, outlines strategies and assignments, and rests on a tight timeline.
- Consider how you can involve members of those target groups.
- Review benefits and create/revise these to meet the needs of target groups.

#### 4. New Members

- A follow-up strategy to welcome new members and encourage them to participate early and often is a critical step in ensuring that they renew their membership.

## Reviving and Revising Your Membership Program

- Call new members within the first month to welcome them and ask if they have any questions.
    - i. The Board Committee on Membership is well equipped to make thank you calls to new members at the highest levels.
    - ii. Other team leaders may be recruited to help expand membership and communicate with new members at more modest levels.
  - A planned program or exhibit or a new small budget activity can be planned to welcome new members at the close of the Membership Campaign. This type of event should be exclusively for new members and should be an annual event.
    - i. The event will be most useful if it is pertinent to your mission, fun, and different. (e.g. Walking Tour of a Neighborhood)
    - ii. New member welcome programs offer a personalized introduction to the organization and is the first opportunity to communicate what the organization is all about. These can be held quarterly and include something as simple as a morning coffee or a wine reception.
  - Give new members two complimentary passes to use within their first two months of membership.
  - Make a special effort to engage members who have not used their membership within the first two months and during the last two months.
5. Member Retention
- A membership program overview outlines steps to encourage the use of membership especially during the first few months and strategies for retention of members.
  - Two months before membership expires, encourage visitation and usage. The more recently they have used your services, the more likely they are to renew.
  - Be alert to natural groupings and don't hesitate to forming affinity groups. Allow these groups to organize their own activities within a framework designed by the staff.
  - Recognize members who frequently visit or use services. The newsletter, recognition signs in the lobby and other vehicles are useful.
  - Look for ways to create commitment, provide comfortable spaces for members and special groups encourage them to make usage a habit.
  - Some members will not participate but will continue to retain membership. That's fine.
  - Focus your attention on retaining members and only secondarily on acquiring new members.
6. Membership Tracking
- Rely on a quality system for tracking membership and usage.
  - Follow-up as appropriate to encourage use and keep members informed of opportunities to participate as well as special offers.

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Membership Software:

[www.YourMembership.com](http://www.YourMembership.com)

[www.gomembers.com](http://www.gomembers.com)

[www.getactive.com](http://www.getactive.com)

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