

Member Recruiting and Engagement Guide



**NMA's NEW
Chapter Leader Training Series**

Chapter Leadership Training

Member Recruiting and Engagement Guide



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ORGANIZATION AND DIRECTION

THE MEMBERSHIP FUNCTION

The Membership Committee is an operating group responsible for recruiting new members, maintaining communication with all chapter members, promoting the mutual interest of NMA, your chapter, and the parent organization, as well as increasing participation in your chapter activities. The Committee Representatives report to the Membership Chairman and the Membership Chairman usually reports to the vice president (although it can be different from one chapter to another). The vice president should provide the chairman with a list of his/her duties as well as the functions and responsibilities the committee must perform. Without such clear-cut instructions, neither the Membership Chairman nor the committee representatives can achieve their basic purpose.

This publication provides some basic tools for use by the Membership Chairman and Committee. These tools are of prime importance in early planning as well as carrying out your plans as the year progresses. It also serves as an operating guide for marketing to potential members and for membership activities.

MEMBERSHIP CHAIRMAN – WHERE TO START

- Study the contents of this manual and make notes on items for which you need more information.
- Attend the Chapter's goal-setting meeting along with the officers and major committee chairmen.
- Plan a training and information-giving program for all Committee Representatives.
- Acquaint yourself with the Chapter and NMA story to share with members, potential members, and your Membership Committee representatives.

DUTIES OF THE MEMBERSHIP CHAIRMAN

As the committee chairman, you are responsible for maintaining a two-way flow of communications with the members. This is based on authority delegated to you by the Chapter officer to whom you report, usually the vice president. In appointing you he/she has indicated confidence in your qualifications and ability to handle the job. To get started, first divide the job into its component parts and then tackle them step by step. Your major duties are as follows:

- Set up a committee organization chart.
- Plan your activities for the year.
- Recruit and train committee representatives.
- Monitor and evaluate the committee's operation and efficiency.
- Set up a regular communication method with your committee representatives.
- Maintain a close liaison with other committee chairs.
- Administer and maintain your committee budget.

FUNCTIONS OF THE MEMBERSHIP COMMITTEE REPRESENTATIVES

- **Maintain two-way communication** – Communicate with members!! Through regular contacts with the members, the committee representatives are in the best position to explain plans and programs directly to all members. They can remind the members about Chapter activities and explain current policies and answer questions about future plans. In other words, they can assure good communications from Chapter leaders to all members.
- **Stay aware of member attitudes** - Inform Chapter leaders of factors leading to member satisfaction and dissatisfaction. At times, representatives may hear comments, suggestions, and complaints from the members. These representatives should communicate this feedback to the membership chairman. This is a valuable way to help improve your Chapter.
- **Increase participation in Chapter activities** - Encourage all members to take advantage of the opportunities for personal and professional development available through the Chapter. Show them your enthusiasm and Chapter knowledge through personal contact.
- **Enlist all eligible members** - Acquaint all people who are eligible for membership with the benefits of membership and active participation.
- **Conduct new member orientations** - Provide an orientation to inform new members about Chapter programs and structure.
- **Promote mutual interests of Chapter, parent organizations, and NMA** - Help promote and advance the mutual interests of the Chapter, the organization and the Association at all times.
- **Recruit new Chapter members** – Identify potential new Chapter members and recruit them. Encourage them to become engaged Chapter members.

DUTIES OF THE MEMBERSHIP COMMITTEE REPRESENTATIVES

These representatives are your front-line troops. They should be interested in the experience they'll get as members of your committee for their own benefit and personal development. The duties most committee representatives perform are:

- Personally contact members assigned; personally invite new members to their first meeting.
- Maintain up-to-date knowledge of Chapter and NMA events.
- Act as a liaison between members and officers.
- Assist with new member orientation meetings.
- Issue membership cards (if you request them from NMA).
- Confirm reservations for meetings and events.
- Ask new members to indicate if this is their first meeting on the meeting registration form, and if so, pair the new member(s) with an ambassador/membership committee member so they don't have to walk in to the meeting alone or have no one with whom to interact.
- Conduct membership surveys and obtain members' evaluations of programs
- Attend membership committee meetings.

INTRA-CHAPTER RELATIONSHIPS

If it is to function as the communications system of your Chapter, this committee more than any other must maintain close working relations with all the departments. The representatives must have "the word" on all Chapter activities and plans, and they must have this in advance so that they can answer questions and quell rumors. The committee chairman gets information by maintaining close contact with Chapter officers, the board, and with fellow committee chairmen. It must be a smooth working relationship built on mutual confidence and support.

COMMITTEE ORGANIZATION

TRADITIONAL CONCEPTS

Traditionally, committee staffing requirements have been stated as a flat percentage of membership, or stated another as a ratio, such as one representative for every fifteen members. This has proven to be an effective way to organize the membership committee and spread the number of contacts for each representative evenly. It means that the representatives can be recruited and assigned near their normal work area. Best of all, it assures some systematic form of organization which certainly is better than none at all. The ratio that is most often used is one representative for every ten members.

Even if the ideal ratio can be attained, this does not necessarily guarantee an efficient organization. It is not always easy for a representative to make quotas of ten or more contacts. The members' locations, security requirements, and departmental ties may limit contacts (this is even more pronounced in community (city) Chapters). Often the traditional concept results in Chapter leaders doing more of the work and "carrying" those representatives who cannot properly contact all assigned members.

ALTERNATE ARRANGEMENTS

When establishing a committee, consider alternatives to a straight ratio. The plan which will work best must be determined by such factors as the nature and number of Chapter activities, size of the Chapter, density of population, and characteristics and policies of parent organizations.

- **Department Alignment** - In this arrangement the committee structure follows the company organization chart with representatives being assigned to each department. The representatives are usually members of the department to which they are assigned. This type of organization works fine where there is strong departmentalization and where departments are centralized and closely bunched within the plant.
- **Management Echelon** - Under this arrangement representatives are picked from among their peers, and contact them only. A representative is never asked to contact a member higher in the company hierarchy, nor is a member put in the position of being urged to attend meetings by the boss or someone else higher on the ladder.

- **Geographic** - In the geographic approach, representatives are assigned in accordance with workstation locations within the organization. They contact all members within assigned boundaries that are based on distance and convenience. Thus, a representative can cut across departmental lines or organizational hierarchy in contacts. A representative may have only two contacts to make if the assigned members are in an isolated location or fifteen or more contacts in an area of dense membership. Community Chapters should consider one or more official "member reps" from each company or enterprise with members in the NMA Chapter. It is doubly important for the membership chair to communicate regularly in the community Chapter environment.

RECRUITING MEMBERSHIP REPRESENTATIVES

One of the questions most frequently asked of Chapter leaders, staff, and, national directors is "how do you persuade people to serve as member representatives?" Because conditions vary greatly in Chapters it is not a simple question to answer, however, it is a question that warrants serious thought. Without good representation, the Membership committee cannot function and the Chapter cannot prosper.

COMMITTEE OPERATING BUDGET

In order to be successful, any committee needs resources beyond the talents of its personnel. To obtain these resources, it usually requires money.

While it is fairly common for the officers or the board to arbitrarily assign a certain amount of money to be used by the committee, it is more realistic for you to estimate your needs and make a recommendation. To prepare your budget recommendation, you must have a fairly detailed plan of action. You should put a dollar estimate on each activity, operating supplies, awards, incentives and training, and arrive at a total. This figure may or may not be acceptable, but it is the most reasonable place from which to start budget negotiations.

Once the budget is settled, you must administer it wisely and efficiently. You must expend the money needed to support your operation and accomplish the committee objectives.

THEME

The theme used in recruiting your representatives is basic to establishing the correct attitude for selling the Chapter and its services. Being a representative is not a task, but a leadership opportunity.

Immediately after appointing a representative, you should:

- Send a letter of acceptance to the new representative and welcome him/her to this important Chapter activity.
- Invite the representative to attend an orientation meeting at an early date. This meeting is not to be confused with committee training meetings. Rather, it is an informal get-acquainted meeting at which time the major duties and responsibilities of the Membership committee are

explained. It is important that each new representative sees and understands the big picture and how he/she fits into it.

QUALIFICATIONS

Before an individual is appointed as a representative, a screening process should take place. Hopefully this gives you a chance to obtain members who will do a good job. At the same time, setting high standards has the effect of making the position seem prestigious because of high standards.

Every representative should have:

- Enthusiasm for the job and the willingness to take special member representative training.
- Sufficient aggressiveness to do a good sales job.

FOLLOW-UP

It is not enough to simply appoint a representative and then expect the individual to do a good job on his/her own. The committee leader must provide help and encouragement at all times, especially at the beginning of the year.

METHODS OF CONTACT

There are several methods your representatives can use to communicate effectively with members. You may want to vary the approach from time to time for variety; or use more than one method when complete saturation is desired.

Duties and requirements are not the same for all Chapters. Physical limitations sometimes dictate the method used. The end result should be a basic system that is reliable, efficient, and achieves some degree of uniformity of action throughout the organization. Some methods that have proven successful are:

- **Face-to-Face Personal Contact** - Whenever and wherever possible representatives should meet personally with assigned members. The importance of personal "conversation" cannot be overemphasized as the most effective means of opening up two-way communications between members and Chapter leaders. It is at the time of contact that the membership committee proves its worth, i.e., justifies the time, effort, and expense in recruiting and training its members. At no other time are a member and NMA in a closer relationship. Make the most of it!
- **Telephone, Email, Texting Contact** - Though less effective than a personal visit, telephone, email or texting can be very useful. As a last minute reminder or when time won't permit "making the rounds," these forms of contact are helpful.

- **Personal Notes, Written Reminders** - Should a member not be available at the time a representative calls, the representative should leave a reminder note. While any piece of paper or intra- company message form can be used, you might find it worthwhile to equip each representative with a supply of cards or note pads on which messages can be written. These are particularly effective when imprinted with the representative's name, title and the Chapter name.
- **Through an Emissary** - There are times when expediency or emergency dictates that a third party is used to make contact with assigned members. There are no set rules or guidelines as to when this technique should be employed, but it should be used sparingly. It is an abdication of the representative's responsibility if someone else is used to discharge his/her duties on a regular basis. The net result would be a loss of valuable experience for the representative and an undermining of the Chapter's communication structure.
- Distribution of Notices, Tickets, Etc.

Sometimes Chapter communications are sent through the organization's internal mail system or via e-mail. These methods are convenient and they generally assure delivery (but cannot guarantee readership). When the internal mail system is used it is imperative that the representative make a follow-up visit to ensure the mail was delivered and remind the member to take action. This approach gives the representative a "reason" for making contact with the member.

In some Chapters the representatives personally distribute the notices. This is most effective if the representative personally hands it to the member and adds a few words for emphasis and clarification. It is poor practice, however, to drop the notice on the member's desk and leave without delivering a personal message.

NMA INFORMATION

Representatives need all the information tools they can get; therefore, many Chapters provide various kinds of aids to help the representatives. In addition, NMA has several brochures that list and explain services, concepts, and background about NMA. Contact NMA or download from the NMA website, <http://www.nma1.org>.

TRAINING THE TEAM

TWO PHASES OF COMMITTEE TRAINING

SPECIFIC CHAPTER INFORMATION

Much of what a representative needs to know consists of news and facts about the Chapter. How much are the dues? When and where does the Chapter meet? These are the kind of questions that are frequently asked by prospective members and those members who do take an active part in the Chapter affairs. Your training program in the specifics of the Chapter is basic for all representatives and must be presented periodically.

SALESMANSHIP AND INTANGIBLES

The second phase of committee training is the continuing development of the skills of salesmanship. How does a representative approach a prospective member? How does he/she persuade a member to attend a professional development program? This is the skill of selling an intangible. You can't see, feel, or test-drive the benefits of Chapter membership, so selling the idea is more difficult than if it were a piece of hardware.

To successfully sell Chapter and NMA concepts, a representative needs:

- A positive attitude.
- Understanding the link between Chapter goals and company/community goals.
- Practice.

These three form the basis for the second phase of committee training.

CHAPTER INFORMATION FOR MEMBERSHIP REPRESENTATIVES

Every member representative must know the Chapter operation; not only what it has been and what it is, but also what the Chapter hopes to be. He/she must be knowledgeable about current practices and long range objectives. It is best if each member representative can get information direct from the people concerned, that is, the officers and leaders of the various committees.

At the beginning of each administrative year it is strongly urged that the entire committee assemble for a meeting to hear plans for proposed activities. This meeting should be carefully planned, well-rehearsed, and properly staged. Allow plenty of time so short cuts can be avoided as closing time nears. See to it that each person on the program gives a concise and complete presentation with time for questions and answers.

A suggested agenda for a two-session training program is shown in Appendix A. The first session covers basic Chapter information and should be at least one hour in length, though probably another half-hour will be necessary to adequately cover all pertinent material.

Many Chapters find it advantageous to start or finish each training session with refreshments or a light snack.

The Job Knowledge Survey Form (Appendix A) is one key to thorough member representative training. It serves a three-fold purpose.

1. It is a quiz to determine each member representative's initial knowledge of his/her Chapter.
2. The completed quiz becomes a worksheet for note taking during the training meeting.
3. It is also a handy reference sheet for use when performing the duties of a member representative.

Filling out the survey should be the first order of business at the first meeting. Most will not know the correct answers to all the questions. The remainder of the information is filled in or corrected during the meeting as the various Chapter leaders make their presentations. The survey form provides a comprehensive reference sheet for use later.

TRAINING SESSION

- Provide an opportunity for questions from the member representatives during the panel portion of the program. They should be encouraged to ask the kinds of questions that are likely to be asked of them later by the members.

OBJECTIVES AND GOALS

- The president or some other officer should review the objectives adopted by the board of directors and translate these to the goals the Chapter will try to achieve this year. These goals will serve as a guide for the member representatives in selling the members on Chapter values.

Committee Structure

- The Membership Chairman outlines the committee organization chart and explains how it fits into the overall Chapter structure.

CHAPTER FUNCTIONS

- The Secretary explains the procedure for new member enrollment and membership renewals. The Secretary also covers all other pertinent areas of record keeping and money handling.
- The Professional Development Chairman outlines the program for the year, providing each member representative with a schedule of dates and descriptions of courses and other educational activities.

- The Program Chairman tells about the meetings for the coming year and provides each member representative with a schedule of meetings (times, dates and places) and a brief description of each meeting feature.

CONNECTION TO NMA HEADQUARTERS

- No training of this committee is complete without an intensive orientation on NMA, its purposes, benefits, and values. A National Director or a past president best covers this.

Announce the date of your training session well in advance so that everyone can fit the date into his or her calendar.

ESTABLISHING ATTITUDES

START WITH A THEME

- The theme used in recruiting your member representatives is basic to establishing the correct attitude for "selling" the Chapter and its services. Being a member representative is not a task, but a leadership opportunity.

IT'S A CHALLENGE

- Ideally, the successful member representative looks upon this assignment as an opportunity, a change of pace from his/her regular job. A successful individual must be able to sell ideas. This assignment offers plenty of challenges in selling ideas to reluctant and sometimes antagonistic member prospects.

ESPRIT DE CORPS

High achieving groups, in all walks of life, are often successful beyond expectations because they have something extra going for them. This something extra is called esprit de corps. Building this spirit is the responsibility of the committee chairman, all the Chapter leaders, and the member representatives themselves. This is done through emphasizing the following:

1. **Importance of their work** - The communications job alone justifies the importance of their work. Couple this with the other aspects of the job and the member representative rates high on the list of important positions in the Chapter.
2. **Identification** - The member representatives should be identified as a group through some distinctive badge, pin or other identification.
3. **Recognition** - Public recognition is one of the best ways to build spirit. This can be done through:

- Periodic awards of achievement.
- Testimonial dinners.
- Display board reporting attendance or other achievements.

ESTABLISHING JOB UNDERSTANDING

PERSONAL VALUE

In the eyes of the individual, this can be the most important of all areas of membership training. It is extremely difficult to impart any job knowledge or develop any real enthusiasm until the member representative thoroughly understands the job and its personal value. The major effort in recruiting and training of member representatives must revolve around value of the experience to be gained.

There are no universal rules covering the functions of a member representative. Each Chapter must work out its own priorities based on needs. However, there are two readily recognizable, broad categories. Each Chapter should consider these, define their limits, and train member representatives on how to handle such functions.

1. **Functions related to regular on-going communications**

- Contact assigned members on a regular basis.
- Contact non-members on a regular basis.
- Be familiar with organization activities and policies of the Chapter and NMA.
- Become the liaison between members and officers.
- Participate in membership committee meetings.
- Promote the Chapter as a medium for personal leadership development and the improvement of leadership skills.

2. **Functions established by Chapter policy** - Certain functions of the membership committee are the result of particular requirements within the Chapter and will vary considerably from one Chapter to another. Typical of such functions is:

- Issue membership cards (if applicable).
- To confirm reservations for dinner meetings and sell dinner tickets.
- To conduct membership surveys, obtain evaluations of programs and perform other duties assigned by Chapter officers.
- To facilitate new member indoctrinations.

TRAINING PROGRAM

SESSION I – CHAPTER INFORMATION FOR MEMBER REPRESENTATIVES

<u>Subject</u>	<u>Presented by</u>
1. Introduction and Job Knowledge Survey.....	Membership Training Coordinator
2. Our Chapter's Objectives and Goals.....	President
3. Structure and Committee.....	All Committee Chairman
4. Membership Do's and Don'ts.....	Secretary
5. Professional Development Program	Professional Development Chairman
6. Monthly Meetings.....	Program Chairman
7. The Big Picture.....	NMA National Director
8. Questions and Answers.....	Panel

SESSION II – SELLING INTANGIBLES

1. Introduction and Review of Session I	Membership Training Coordinator
2. The Role of the Member Representatives	Membership Chairman
3. Role Playing Exercise	Membership Chairman
4. Group Discussion.....	All

MEMBERSHIP COMMITTEE CHAPTER JOB KNOWLEDGE SURVEY

(FOR USE IN CHAPTER TRAINING— SESSION I)

How well do you know your NMA Chapter?

Answer each of the questions below as completely as possible. Use blank spaces on opposite pages where necessary.

- 1. Name the officers and committee chairman of the Chapter.**

OFFICERS	COMMITTEES

- 2. Draw a rough organization chart of your Chapter showing Board of Directors, elected officers and standing committees reporting to them.**
- 3. List the main objectives of your Chapter for the current year.**

- 4. What are the membership eligibility standards? (Be specific. "Any member of management" is not a proper answer.)**

5. Name each committee or department (such as program, etc.) and under each list its major function and/or projects.

COMMITTEE	FUNCTIONS	PROJECTS

6. What is the total current membership of the Chapter? _____
 What is the potential membership? _____

7. What are the annual dues and how is the dues income spent?

8. When and where are monthly meetings held? List four future programs.

9. When are officers elected and how can members become an officer?

10. How are committees established, and committee chairmen chosen? How does a member become part of a committee?

11. What is NMA?

12. What can your members gain by belonging to the NMA Chapter?

13. What is the step-by-step procedure to become a member of the Chapter?

14. Is your Chapter a member of an NMA council? If so, who are the officers, and what are the activities of the Council?

15. What are the duties of Membership Representatives?
