



RIMS
MEMBERSHIP DRIVE
HANDBOOK

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I. Introduction

Recruiting new members is one of the most important tasks that your chapter will face during the year. It is important because a growing chapter is a vibrant and healthy chapter.

The only way to ensure that your chapter continues to be a strong, powerful voice for risk managers and the service providers in your area is to keep its numbers multiplying. Not only will you be increasing the knowledge base of your chapter, but also increasing dues revenue. As a RIMS member, and a chapter officer, you understand the value of your membership. Share that knowledge with your friends in the risk management community. Like you, they also want to sharpen their skills, overcome their challenges and link up with other professionals.

Increasing chapter membership is an ongoing challenge. There are no short cuts that will produce meaningful membership growth and yield talented individuals to fill the variety of voluntary roles (*future leaders, committee members, etc.*) in a chapter. Recruiting the quality firms and deputy members the chapter requires will take some work, but will prove worthwhile.

This task can be accomplished as long as there is a plan developed by your board that has the buy-in of all members. A cause that is not supported by everyone cannot succeed.

This handbook will provide you with suggestions on how to develop your Chapter's plan and, more importantly, how to work the plan to reach your goals and objectives.

II. Definitions of Membership Categories

Before you can begin focusing on increasing your chapter's membership, it is important that you are comfortable with the definitions of the various RIMS membership categories and the different eligibility requirements. All formal definitions can be found online in the RIMS Constitution and Bylaws. They are located at: www.RIMS.org/Bylaws.

These questions and answers will help you determine the appropriate membership category for prospective members:

Is the prospective member an employee of a company/organization for which s/he has risk responsibilities?

Her/his company is eligible to become a **Corporate Member** of RIMS and s/he and a colleague who is also an employee with risk responsibilities will be that company's individual members (referred to as a Deputy member). Two memberships, the Primary Deputy and Secondary Deputy, are included in the basic Corporate annual dues*. The membership belongs to the organization, not the individual.

Does the prospective member provide products or services to those in the risk management profession?

For instance, are they a broker, underwriter, consultant, attorney, accountant, actuary or outsourced risk manager? If so, then, s/he is eligible for **Associate** membership in RIMS. Associates have all the privileges of membership except they are not eligible to serve as voting members of Boards or Committees at the Society or Chapter level. The membership belongs to the individual, not to his/her employer, regardless of who pays for the membership.

Is the prospective member a fulltime professor or dean in a program providing risk management, insurance, or business education?

S/he is eligible for **Educational** membership.

Is the prospective member a former Deputy or Associate member of RIMS now fully retired from the risk profession?

He/she is eligible for **Retired** membership.

Is the prospective member a fulltime undergraduate or graduate student working towards a degree in risk management, insurance, or business and not eligible for membership in any other category?

She/he is eligible for **Student membership**. RIMS has waived Society dues for Student members but they must provide a copy of their transcript showing them to be fulltime students along with their application form.

Was the prospective member a Deputy or Associate at the time they were separated from their employer?

S/he is eligible for **Affiliate status** with a waiver of Society dues for up to two years from the date of that separation. Most chapters opt to waive dues for these individuals as well. To implement Affiliate status, the individual must contact membership@RIMS.org to update his/her member record.

- * **All RIMS members are required to join their local chapter and pay applicable dues.**

Chapter Only Members/Affiliation

Your chapter may opt to allow “chapter only” membership for anyone who does not qualify for Deputy membership (all risk professionals who qualify for Deputy membership must join the Society as well as the Chapter). However, this category may cause some confusion so make sure you let “chapter only” members understand that they are not members of RIMS Society. They do not receive Risk Management magazine, are not entitled to member discounts and do not have access to members-only sections of the RIMS website. They may not serve in elected positions on your Chapter Board or as Chairs of Chapter Committees. Be sure to offer them the opportunity to receive all the benefits of RIMS membership.

III. 2011 Dues Structure

Society Dues

The most current, accurate RIMS Society dues are listed on the website at www.RIMS.org/Dues.

Corporate Membership

Society dues are **\$525** U.S. per year, plus any applicable local chapter dues. This fee entitles the company to designate 2 representatives, known as deputy members, who are fulltime employees with some internal risk management responsibilities. Additional deputy members may be added for **\$170** U.S. each per year, plus any applicable local chapter dues.

Associate of the Society

Society dues are **\$525** U.S. per year, plus any applicable local chapter dues.

Educational Member

Society dues are **\$110** U.S. per year, plus any applicable local chapter dues.

Student Member

Society dues are **waived** for Student members. Many chapters choose to waive chapter dues as well, but if the chapter does charge dues for students, the Student member must pay those dues.

Affiliate Member

Society dues are **waived** for Affiliate members for up to two years from the date of separation from their former employer. Many chapters opt to also waive chapter dues for these individuals.

Honorary Members

There are **no** Society **dues** collected from Honorary Members.

Retired Member

Society dues are **\$110** U.S. per year, plus any applicable local chapter dues.

Recent Graduate Dues

If the prospective member earned his/her initial bachelor's degree within the s/he may be eligible for reduced dues as follows:

For Deputy members, the Society dues would be:

- 1st Year - \$ 50
- 2nd Year - \$ 75
- 3rd Year - \$100
- 4th Year - \$125
- 5th Year - Full Additional Deputy Member Dues

For Associate members, the Society dues would be:

- 1st Year - \$ 50
- 2nd Year - \$ 75
- 3rd Year - \$150
- 4th Year - \$300
- 5th Year - \$500 – Full Associate Dues

In order to qualify for this reduced dues benefit, the candidate must submit one of the following to document his/her graduation date:

- Copy of his/her diploma with their degree and graduation date
- Copy of his/her transcript with degree earned and graduation date
- Letter from department head or dean, verifying graduation date and degree earned.

Chapter Dues

Your chapter sets the amount of dues that will be charged for each membership category and submits them to RIMS by September of each year. Some chapters collect a year's worth of chapter meeting fees up front as part of their annual dues, while others charge a yearly fee and each meeting is invoiced separately.

RIMS includes chapter dues when invoicing members for renewal, if you wish, and provides your treasurer with a monthly report and electronic fund transfer of the dues amount owed to your chapter. If you have "chapter only" members, your Chapter is responsible for collecting their dues.

Remember that your dues must be commensurate with the value you are providing your chapter members. Membership is a product that must provide value for the price.

IV. Member Benefits

It is important to familiarize yourself with the many benefits that RIMS offers its members. Your own personal reasons and the benefits you receive from being a RIMS member are just as relevant as anything listed on the RIMS website. While you'll want to visit the RIMS website at www.RIMS.org/Benefits for up-to-date and detailed benefits, in general they fall within these categories:

RESOURCES

- Enterprise and Strategic Risk
- Research and Reports
- Career Center and Job Bank
- RIMStore
- Legislative Action Center
- RIMS Buyer's Guide

LEARNING

- In-Person and Online workshops, webinars and coursecasts
- *Risk Management* magazine
- RiskWire Daily News Consolidation Report
- Student Resource Center
- *RM Monitor* blog
- Educational Symposiums

CONNECTIONS

- Local Chapter Meetings
- Risk Professionals Directory
- eGroups
- Government Affairs and RiskPAC
- LinkedIn Group
- Conferences and Events

Understanding RIMS eligibility requirements, dues structure, and benefits will help you develop your membership recruitment plans.

V. Before the Plan

There is a basic set of steps when developing a plan to increase your Chapter's membership.

- 1. Determine your Chapter's goals and objectives** – These should be both short and long term. Set ambitious but realistic expectations for all parties involved and make everyone aware of what is expected. Expectations set too high can lead to a sense of failure, damaging the overall morale of the volunteers.

It's important to define what "success" will look like. Decide how many new members you are trying to acquire. Are you trying to increase your membership by 5%, 10%, 10 companies? Are you trying to fill vacancies on the board? Which category of membership are you looking to increase? – Corporate members? Associates? Both?

- 2. Define your chapter** – Identify the image of the organization, how it maintains member satisfaction, define what are the changing demographics and needs of the profession. What will it take to motivate a prospect to become a member? Why do people become involved? Why did you become involved? You need to know who you are before you can start recruiting new members. What is the quality of the programs your chapter offers? Are your meetings welcoming to new members? Do you send meeting announcements with advance notice? Do you nurture the current members that you have? It is difficult to plan if you don't answer these questions first.
- 3. Develop a campaign budget** – The best plan and the best intentions will go nowhere without adequate financing. Remember, this is an investment in the Chapter's future. Determine the costs for mailings, brochure printing, phone calls, etc.
- 4. Develop a step-by-step plan.** This will help you to see the bigger picture of the campaign. You'll be able to both define and make assignments for all the steps – such as who will write the pitch letters and by when. When will the phone calls start? Decide on your campaign's timeframe. Identify the resources that RIMS can provide – membership brochures, customized applications, dues discounts, etc.

- 5. Evaluate your results.** You will need to take a close look at what you did and what the results were. This is just as important a part of the campaign as the actual plan. What did you want to happen as a result of your membership drive? How many new members did you gain? How many new members in each category? How many did you have to start? Was the program worthwhile? How many “new” people know about RIMS and your chapter?

The first question might be fairly easy to answer – What did you want to happen as a result of your membership drive? While it is obvious that you are trying to attract as many new members as possible to the chapter and RIMS, the long-term plan must be addressed as well. Your goal is to gain members who will become active participants – attend meetings, facilitate communications, recruit new members and serve as committee volunteers and eventually become board members. New members bring with them new ideas, vitality, and will support your succession planning. They will give your Board the opportunity to begin priming others for Board positions when they become available. New members’ enthusiasm for the chapter will carry over to other members and begin to break through the lax behavior or burnout that sometimes begins to take over. An active chapter with enthusiastic members is one that people want to belong to and where they will want to dedicate their time.

- 6. Get your new members involved.** There’s an old saying in association work: “An involved member is a happy member, and a happy member renews!” First year members always have the greatest loss rate when renewal time comes around, mostly because they don’t find the value in their membership that they thought they would. It’s up to you – the chapter leaders – to make them feel welcome and valued, and to get them involved at the local level.

Start by taking a look at your current members. Are their needs being met by the programming that you are offering? Is there something missing that they would like to see offered?

- Conduct a chapter survey to find out.
- Conduct informal focus groups at chapter meetings
- Consider using the PERK program (www.RIMS.org/PERK)

Not only will you learn what your active members are thinking, but a survey will also give you the opportunity to reconnect with members that you have not seen in awhile. Visit www.surveymonkey.com for a free, simple online survey development and delivery tool. Be prepared to contact the members

who do not complete the survey. These are usually the members who do not show up for your meetings and are the people you are trying to bring back into the chapter.

Area demographics and industry changes also will affect your chapter. Mergers, acquisitions and outsourcing will change the makeup of your chapter, as well as the pool of potential members. Stay current with the companies in your area. If there is a new Risk Manager, who is it? This will take some work, but it is not only valuable information for your chapter, it is good for you to know as well.

What's the WIIFM? (*What's in it for me?*)

People tend to join groups, including associations, for professional or personal gain. You'll need to inform potential members about the skills, knowledge and contacts they will acquire or improve by becoming a member of RIMS, and how being active in the chapter will help them to advance in their career. **Explain how being a member will benefit their company.** Always look at it from their point of view. Ask them what they need and what they are looking for and tell them why RIMS can help them. You must **LISTEN** to what they want then give it to them. Simply providing a list of "stuff" won't work; you'll need to understand what they need and explain how RIMS membership can provide it. Don't just say "We have the best speakers... join and find out" – be specific and focused.

Use your own experiences to appeal to other professionals. Your own testimony of what you have gained by being a member is a bigger selling point than any printed brochure.

Services that are intangible, such as networking, and a sense of belonging should not be overlooked when assessing the value of membership. Equate networking with identifying solutions. For some, this is more important than the educational programs you might offer.

You can't win them all. There will always be those individuals on your prospect list who will not join no matter how terrific your services and chapter benefits are, or how often you solicit them. Take these individuals off your lists. Continuing to try to recruit them not only frustrates you, but also irritates them and practically guarantees that they will not join.

VI. Getting Started

Step 1 – Committing & Assessing

- Commit to a membership campaign.
- Chapter assessment. *What do we have? What do we need?*
- Analyze past membership campaigns the chapter has held.

Step 2 – Setting Goals

- Set clear, attainable objectives.
- Decide what type of campaign you are going to run.
- Determine the campaign timeframe.

Step 3- Budgeting

- Understand your chapter's finances.
- Designate funds for the campaign.

Step 4 – Creating the Plan

- Based on your goals, develop a work plan, assign responsibility for specific tasks and recruit additional volunteers to round out assignments.
- Identify where to find prospective members.
- Obtain lists.
- Develop the “offer”
 - Invitation to meeting
 - Society and/or chapter dues reduction
 - RIMS membership pin
 - Mentor
- Assign someone to write the prospect letters and/or recruiting scripts.
- Select the content of your membership packets

Step 5 - Implementing the Plan

- Divide prospects among volunteers
- Write prospect letters.
- Assemble membership packets.
- Mail membership packets with prospect letter signed by the chapter President, include a phone number of someone within the chapter to call for information.
- Assign each prospect to a chapter member who will be responsible for calls, follow-up, questions, etc.
- Follow up by phone to letters that were sent out.
- Meet as a group to share findings.
- Hold a chapter meeting focused on New Members/ New Prospects.

Step 6 – Invite prospects to a meeting

During The Meeting

- Assign each new attendee/member a buddy or chapter mentor.
- Seek out guests. Call them guests, not prospects.
- Watch by the door for new attendees.
- Personally greet them when they arrive.
- Introduce guests to others.
- Use nametags. Color-code them for newcomers.
- Make sure Board members spread out among all the attendees.
- Have a volunteer talk about the benefits of membership after the program; if possible, explain specifically how membership has benefitted him/her or his/her company.

After the Meeting

- Send “Thanks for coming” letters or emails, plus ACTION. “Join us at our next meeting.”
- Keep on the email list for chapter events.
- Make sure you have a significant but reasonable cost differential between members and non-members; if you don't, there's less incentive to join.

Step 7– Follow-up and Maintenance

- Reach out to those who have joined. Offer to meet them at the next meeting.
- Introduce new members in your newsletter and on your website.
- Immediately get each new person involved on a committee or with a task.

Step 8 – Measure Results and Recognition

- Review and analyze what you have done. Did the results meet your goals?
- Calculate how many new members you have gained. Don't be discouraged if it's not as many as you had hoped. This isn't always easy.
- Determine how the campaign helped the chapter.
- Recognize members who have volunteered their time to the membership effort. **This is very important.** Make sure to do this at a chapter meeting and feature it in your newsletter and on your website. Remember everyone has volunteered his or her time.

Step 9 – Retention

- Welcome new members with a letter from the Board and welcome kit with a copy of the chapter newsletter, board member roster, etc.
- Put each new member on your mailing list immediately.
- If a new member has just joined and your chapter is breaking for the summer, tell them! They will feel forgotten if you don't advise them that the next meeting won't be until September. Consider a summer event that focuses on new members (but try not to schedule a membership campaign immediately before your chapter has its summer "hiatus.")
- Continue to stress the value of membership and keep members informed of new products and services coming from RIMS. Consider conducting a "value" briefing and a RIMS website "where to find it" presentation to prospects and new members.
- Have a plan for new members to become active members. Make sure you have volunteer activities that are time sensitive and specific so they won't be immediately overwhelmed. Greeting people at one meeting or writing a short piece about themselves for your newsletter or website is a great way to start. Create an air of excitement about being involved. Recognize those people who do get involved.
- Ask new members for their opinions.
- Make it fun!

VII. Details for Getting Started

Below you will find in depth information about each step of the membership campaign outlined on previous pages.

Step 1 - Committing and Assessing

Getting your members' buy-in is crucial to the success of any recruitment program, because it is your members who will be the most effective recruiters. Your members must be convinced that this is a worthwhile investment and use of their time.

Take a look at your chapter and what campaigns, if any, have been held in the past. If you held a telephone campaign, try something different like an e-mail distribution. Determine what will work best in your geographical area. Discuss different initiatives at your chapter's board meeting. Often overlooked when assessing your chapter is whether or not your chapter can support these new members. Are your programs strong? Is your networking effective and

rewarding? Do you have different types of events that address the diverse needs of your membership? If the chapter is not succeeding in these areas, no one will want to join. New members should not be expected to come in and solve problems that the chapter might be facing.

Step 2 – Setting Goals

Your goals should reflect the total potential of your geographic area. Separate your goals into the specific RIMS membership categories – Corporate, Associate, Educational and Student. Decide which membership category(ies) you want to increase. Once your goal is established, publish it everywhere you can, and provide follow-up reports on how the campaign is progressing. Be positive; encourage your members to be enthusiastic about reaching the goals that have been set. Emphasize how an increased membership will benefit the chapter's ability to offer worthwhile programs. Emphasize that teamwork is needed to succeed.

Set a realistic (albeit ambitious) goal for your membership drive. If you set your goals too high and the chapter is unable to meet them, it lowers morale and threatens the campaign. To keep morale high, make sure the goal is attainable and make every effort to surpass it.

Always remember that
more members = more volunteers and
more dollars = more new programs

The impact of more members joining your chapter is twofold. You increase the knowledge base for the chapter, which is invaluable, plus you increase the resources to provide better services and programs.

Now that you have set your goals, the next step is to decide what type of campaign you are going to run i.e. mailings, phone calls, special meetings, and how long the program is going to last. Determine what resources the chapter has for this initiative. And make sure you know how RIMS can help the campaign with discounted membership dues, customized applications and printed materials.

RIMS will provide a \$100 dues discount for new corporate or associate memberships and a \$30-50 discount on new additional deputies recruited during a membership campaign. RIMS will also provide customized applications with your chapter designated as the chapter-of-choice for the new members as well as imprinted with a customized discount code for your

campaign. By using this type of code, not only is the discount automatic but RIMS can run reports for you telling you exactly how many (and who) joined during the campaign. RIMS can also provide a discount on RIMS pins – a nice way to acknowledge new members.

Step 3 - Budgeting

By now, your chapter has agreed on what type of campaign you want to run and the goals it hopes to achieve. Next, you need to develop a budget for the campaign. Budget for the printing of materials, postage, lists, telephone charges, prizes for the member who recruits the most new members, etc. Your treasurer should be prepared to keep accurate records of all your expenses. These records are necessary for planning future campaigns and to evaluate the cost effectiveness of the campaign you will have run.

When setting your budget, you might want to consider making the new members' first meeting and meal complimentary. If you can afford to do this, it is a nice touch, and might bring in more attendees. Just be sure it is included in your final budget for the program.

Step 4 – Creating the Plan

Now that you know what your goals and budget are, create a plan to achieve them. The keys to achieving your goals are to make sure that deadlines are set and met, and members accept responsibility for various pieces of the project.

Primary tasks include:

- writing the prospect letter,
- writing thank you notes,
- assembling the membership kits,
- qualifying prospect lists,
- making individual assignments
- organizing follow-up procedures
- acknowledging new members

A project of this nature cannot succeed without everyone being clear of what is expected of them, and by when. Remember that you must have a core set of volunteers in order to reach your goal.

“Where are we going to find our prospective members?” Prospects can come from a variety of sources. Start with non-members on the RIMS database in your geographic area; these are individuals who have attended a conference, purchased a product, attended a workshop or have, in some way, liaised with

RIMS but have not yet joined. Other sources include your brokers, other association directories such as PRIMA, ASSE, ASHRM, CPCU, trade press subscribers, commercially available mailing lists, Chamber of Commerce, and purchasing lists, such as from Dun and Bradstreet or using the Yellow Pages.

Remember that it is VERY important to take the time to qualify these lists. That means dividing the list amongst volunteers, purging current members and verifying the correct name and address of the person performing the risk management functions.

Customization is KING. There is nothing worse or less productive than receiving a letter addressed to “Dear Risk Manager”, having a person’s name misspelled, or identifying someone by the wrong gender.

While all of these sources carry great potential, your greatest resource is probably sitting next to you at your chapter meetings – **Each Other!** Who do you know? Who do your Associate members know? Who does your broker know? They have clients who would benefit from being a member. In order for this approach to work, there should be something in it for the person doing the referring. Offer a prize to the person who brings in the most members - a free Annual Conference registration, a free hotel weekend, or perhaps even money for each member who the volunteer gets to join. This should be part of your budget for the campaign.

Select in advance what your membership packets should contain. Membership applications, benefits brochures, upcoming meeting notice, newsletter, letter from the President, invitation to the special membership event, including an RSVP card, member testimonials, anything that you think will capture someone’s interest to join.

Step 5 – Implementing the Plan

1. Assign someone the task of writing the introduction or prospect letter. A sample can be found as an appendix in this handbook and on the Chapter Officers Tools & Resources area of the website. Make sure that the letter highlights the benefits of membership, as well as your chapter’s upcoming programs and events. Write it from the perspective of the reader. What’s it in for them? If you are inviting them to a specific event, make sure full details are supplied. If you require guarantees make sure to put in an RSVP date that is reasonable. Everyone is busy, so give people enough time to arrange their schedules. Always make sure that the letter provides the phone number of someone to contact for further information or questions.

2. Each committee member should be assigned a list of prospective members to contact. Be sure to know as much about the prospect as possible when calling. You may want to have members in an industry contact prospective members in that same industry. Be prepared to answer questions and solicit a verbal RSVP. While most people have the best intentions, you'll find that most ignore the RSVP requirement.
3. Hold monthly meetings (by conference call if face-to-face meetings aren't practical) of the membership committee to address questions, issues and to update on progress. Communication between the groups of volunteers is key for this program to work. If you are conducting this membership campaign as a telephone drive, it would be ideal to have a facility to make all the calls at once. Ensure that all your volunteers are prepared to discuss the benefits of RIMS membership, and understand the different categories of membership. Write a script for volunteers to follow. Train the callers. Have refreshments available. Secure prizes for the volunteers to thank them for their time. Award a high profile prize for the member that recruits the most new members. Be sure that your Board is also involved in this process; otherwise it will be very disheartening to the volunteers.
4. The responsibility of putting together the membership packets should be divided amongst the membership committee and any willing volunteers.

And most importantly, remember to have fun! While it can be a lot of work, it should be a worthwhile and fulfilling experience for everyone involved.

Step 6 – The “First” Meeting

Assuming guests may attend your chapter meeting, your chapter leadership should be assigned to watch out for them, greet them, talk to them and then pass them on to another member that will do the same. Introductions to others help get one off to a good start. Some people are naturally gregarious; others need a little handholding. For most of us, walking into a meeting where you do not know anybody can be very intimidating. Chapter Board members should spread out and sit at separate tables, encouraging networking at their table. Use nametags to promote conversation. Consider color-coding nametags to identify newcomers. It is the job of every member to be friendly and open which enhances your chance of selling membership. Have a relevant and engaging program with a good presenter to encourage attendance.

Make sure your chapter members know there will be new people at the meeting and they should make every effort to attend and assist the chapter by seeking out these guests.

Every meeting is a potential opportunity to “sell” RIMS Society and Chapter membership. You might consider having Board or chapter members discuss why they joined, and what benefits they receive for themselves and their employer. Most people will react favorably to listening to the real world value, as opposed to a list of benefits. Don’t underestimate the value of testimonials.

Step 7 – After the “First” Meeting

Make sure to send a letter thanking each prospect who attended the meeting. If someone was planning to attend but did not, send a letter with a "sorry we missed you" sentiment. Do not be discouraged if prospects do not attend the first meeting they are invited to, or do not join after attending one or two meetings. Keep all prospects on your mailing list for at least 3 months to provide them with the range of meeting topics and the interests of your chapter. It is important to maintain phone contact during this time but avoid the “hard sell” – RIMS is a great organization so you want to emphasize the value without over-selling. Each officer is responsible for maintaining contact with a designated list of prospective and new members. Spread the work around. Remember, it is going to take time and effort before these prospects turn into members. The faster you act, the better the chance.

Step 8– Follow-up and Maintenance

No matter what method you choose to use for your campaign, don’t forget to schedule time to follow up. Remember that someone is not a member until your prospect has submitted a completed application with payment and it has been approved by RIMS and your chapter. Decide on a point person to handle all the callbacks and “close the sale” or assign individual follow-ups to multiple volunteers if there are lots of needed follow-ups. If someone attended the meeting, thank them for coming and remind them of the benefits of joining.

If within the next month they have not joined, send a follow up communication. Remind them of the last meeting and invite them to the next. Also, make sure to reiterate the benefits. You may want to include a testimonial sheet, a listing of quotes from members on the value of membership.

Send a personalized “thank you” to your new members, along with a welcome packet (RIMS sends a new member welcome kit within two weeks of joining). A chapter welcome packet should include a welcome letter from the President, an introduction of your chapter’s board members, updates on upcoming meetings and events, your chapter’s Web site address, and any special notices that have been mailed to bring them up to date. The goal is to make the individual feel

that they are an important addition to the chapter. This is the time when “chapter habits” are developed. If the member develops an early pattern of not attending meetings, they are not likely to remain a member.

You might want to include, along with your welcome letters, a new member profile form, a brief series of questions to understand what your members are interested in. This will allow you to see what your new members are looking for and expecting from the chapter. This information will help you approach the new member about volunteering in an area they are interested in.

Be sure to list all the new members correctly with their company names in your monthly newsletter and on your chapter website. If space allows, you might want to include brief biographies. Your chapter might want to hold an orientation meeting for new members which can combine information about the chapter with information about RIMS benefits to encourage new members to participate in RIMS activities and to answer any questions the members might have. It is also a great way to build enthusiasm for participating on your committees.

Encourage active participation from all your members, not only new. Those who give their time and talents to the chapter and to RIMS gain the greatest satisfaction and reward. Remember that the first year of membership is critical. Without engagement, inclusion, and participation during the first year, a new member is not likely to renew for a second year.

Step 8 - Measure Results and Recognition

Review and analyze what you have done. Did the results meet the goals that the chapter had set? If yes, EXCELLENT JOB! Be sure that your notes reflect all the steps that the chapter took to meet its goals. It is always easier to work on your next drive with a plan that has a proven track record. If the goals were not met, why? Was it the time of year the drive was held? Was it not enough volunteers participated? Did the program not have the buy-in from the whole chapter? Was there not enough budget? The important thing is to learn from what you have done in order to continue to build on the effort made.

Be sure to recognize all those that contributed to the membership effort. **This is one of the most important steps of your entire drive.** People need to be recognized for the work they have done.

Feature your volunteers in your chapter newsletters and on the chapter website. Send personalized thank you notes to everyone that participated.

Schedule time at the beginning of your chapter meeting to publicly thank everyone that was involved and report results.

Remember, volunteers are the key to your chapter's success!

Step 9 – Retention

Recruiting members is only half the battle...retaining them is the other half! The chapters that are the most successful in accomplishing their goals are the chapters that make a concerted effort to involve as many of their members as possible in chapter activities.

Remember, your members are constantly being sought out by other organizations for their time and resources. Once you know what they want, you will know if RIMS is a good fit for them. Your job is to assure them that their efforts and involvement with the chapter are an important part in enriching, not only their activities with the chapter, but their professional career as well.

Today's volunteers expect:

- To be part of a well managed organization that doesn't waste precious time.
- A clearly defined job with a realistic and manageable time commitment.
- Roles in making decisions that affect them and their work.
- Recognition that matches their motivations for getting involved.
Assignments that produce results.
- To meet real needs.

Get new members involved right away. Help them feel connected to the chapter by asking them to volunteer to sit on a committee or to work on a project. Asking a new member to be part of your chapter board may be too scary a prospect to start, so use a committee assignment or a time-specific task as a stepping-stone. Promote opportunities for volunteers through ads in your chapter newsletter, personal telephone calls, sign-up sheets in welcome packets, and targeted mailings. Promote the work of the committees and the vacancies that need filling during your chapter meetings. Make a real effort to get new people involved rather than relying on the same core group of volunteers who always step up. Your membership base will start to suffer if the group is viewed as being a clique.

Solicit your members periodically to see what it is they want and expect from the chapter. Make an effort to meet these expectations when planning your

chapter's activities and meetings. If someone indicates a specific concern on a survey or during a meeting, contact him or her to discuss the issue. Your members want to know that they are being heard.

Your retention effort can only be successful if you **MAINTAIN GOOD CHAPTER RECORDS**. Make sure that you are pulling your chapter rosters off the RIMS web site on a monthly basis. Make sure your lists are accurate. Check to ensure that the e-mail addresses that you have in your distribution lists are up to date. Use these lists to make sure that your meeting attendees are current members of RIMS.

The following suggestions might help you to organize a successful retention program:

- Establish a committee so that one person doesn't do all the work.
- Appoint a Membership Committee Vice-Chair for retention.
- Develop a retention plan.
- Spread the job – get everyone -- members and board members -- involved in calling new members, lapsed members, etc.
- Request feedback from members on how programs are meeting their training and development needs.
- Provide a means for members to talk about their concerns, complaints and suggestions. Always provide answers to their questions.
- Consider alternating meeting times and locations to permit members to attend.
- Consider forming car pools to meetings if a large number of your members are located in the same area.
- Develop high-level chapter projects (student mentoring, career development assistance, focused training programs) to interest senior members who have more experience.
- Conduct an orientation program for new members.
- Look for opportunities to report on the achievements of members.
- Encourage board members to get to know chapter members by circulating at meetings.
- Consider assigning a board member to introduce new members and guests at the monthly meeting and guide them through the process until they begin to feel comfortable. Having a "buddy" assigned to a new member helps to bring the new member into the group and encourages participation.
- Issue plaques, certificates, free seminars, etc. to reward member efforts. Write letters to members and offer to copy their employers expressing thanks and explaining the success of the project and how it will benefit the community, business or chapter.

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- Consider getting your members involved with public service projects. It is excellent visibility for the chapter and helps promote a “family” atmosphere within your chapter. People will want to belong!
- Keep new members happy! Add them immediately to mailing lists. The new member should not have to call to find out when he or she will be contacted. You have only one chance to make a first impression.
- If your chapter takes the summer off, and a member joins during that time, it is still important to welcome them. The new member will not know that the chapter is on hiatus, all they will know is that no one contacted them.
- Call to invite them to their first meeting. Welcome them warmly. Invite them to serve on a committee or take on a time-specific task.
- You do not have to “sell” members on membership, but you should remind them of the value of their membership. Don’t wait until a member is about to lapse before you start reminding them why they should remain a member.
- Develop a contest and award the member who brings back the most non- renewed members, or new members.
- Network!
- Lead by example.
- Have Fun!

Summary

- **Form a membership recruitment team.**
- **Create your prospect lists.**
- **Establish your chapter's goals.**
- **Review and budget your resources.**
- **Decide the method of recruitment.**
- **Consider an incentive to join.**
- **Be clear on the reasons why people should join.**
- **Know the value of your chapter and RIMS membership.**
- **Appeal to your prospective members as individuals. When possible, personalize mailings, etc.**
- **Keep your promotion pieces simple and straightforward.**
- **Welcome new members as soon as possible.**
- **Maintain accurate records.**
- **Invite new members to their first chapter meeting.**
- **Make members feel connected to the chapter.**
- **Develop interesting programs.**
- **Get members involved quickly.**
- **If a member isn't renewing, find out why. In many cases, the problem can be corrected.**

As you can see, the membership equation is equal parts recruitment and retention. As simple as it sounds, members who are welcomed, advised and informed, involved and recognized, who perceive that the chapter and RIMS are benefiting them, will renew year after year. Sample letters and scripts follow on the next few pages.

RIMS Membership and Chapter Services staff are available to assist you with developing your membership drive and answering any questions you might have. You can reach us at 212-655-6220 or membership@rims.org. You can also use the online Chapter Officers eGroup to post your questions through the RIMS website. If you have not already done so, be sure to [subscribe to this eGroup](#).

Remember there are 80 chapters whose officers out there that may have the answer to your questions!

Holding a membership drive is a rewarding process, but it does take time and the commitment of the whole chapter. You belong to the premier association for Risk Management professionals; showing your enthusiasm and getting others involved will increase the knowledge base of the chapter and RIMS.

VIII. Sample Recruitment Communication Ideas

Phone Script for a Telephone Marketing Campaign

- 1) Before you call – Read the entire phone script. Familiarize yourself with what you will need to know and say. Read the person’s name out loud to pronounce it.
- 2) Identify yourself. – “Hello, this is _____, job title, with your company name, but today I am calling as a member of the _____ chapter of the Risk and Insurance Management Society.”
- 3) Encourage them to join - “The ____ Chapter is a local network of risk management professionals who face many of the same issues as you might on a daily basis. We have an upcoming session that you might find interesting”.
- 4) Give the details about your upcoming meeting. Offer a discount on attending or free attendance, whatever the chapter has budgeted for. Confirm attendance or offer to follow up in 2 weeks to see if they have decided.
- 5) Discuss benefits. “RIMS _____ chapter members have access to programs like this one on a monthly basis, plus.....”
- 6) Ask if you can send them an application for membership so that they can bring it with them to the meeting. If they say no, ask them to keep the _____ chapter of RIMS in mind for their risk management needs.
- 7) Thank them for their time, give contact information for yourself so they can contact you with any questions they might have and be sure to follow up if necessary.

Sample Recruitment Letter or Email

Dear First Name:

You know the importance of keeping up to date with current issues facing the risk management profession. By joining Risk and Insurance Management Society, Inc. (RIMS), you will have access to the education, networking, and resources available to all members.

RIMS members receive a host of benefits, including:

- Access to industry eGroups, your online source for solutions;
- Subscription to *Risk Management Magazine*, an in-depth monthly publication;
- RiskWire, RM headlines delivered to your email inbox;
- Substantial conference discounts;
- Networking at the local chapter level;
- Access to our online Career Center and Job Bank;
- State-of-the-industry research;
- Discounts on RIMS educational courses and publications;
- And More!

Our local _____ chapter offers you the opportunity to attend high quality professional development seminars, (*list chapter benefits here*).

I know that you will find membership to be of great value. Enclosed is an application for membership and a brochure that details the benefits available to members. If you have any questions, you can contact me at xxx/xxx-xxxx or at email@yourcompany.com.

Sincerely,

Your name
Your position or role in the chapter

To Download Chapter Letterhead:

- Go to www.RIMS.org
- Login
- Click into Chapters > Chapter Officer Tools and Training Resources > Stationery & Templates

Sample Follow-Up Recruitment Letter or Email

Dear First Name:

It was a pleasure speaking with you today regarding membership in the Risk and Insurance Management Society, and the local _____ chapter. As promised, enclosed is an application to join RIMS.

As a member you will have access to the following Society benefits:

- Access to industry E-Groups, your online source for solutions;
- Subscription to Risk Management Magazine, an in-depth monthly publication;
- RISKWire, RM headlines delivered to your e-mail inbox;
- Substantial conference discounts;
- Networking at the local chapter level;
- Access to online Career Center and Job Bank;
- State-of-the-industry research;
-
- Discounts on RIMS educational courses and publications;
- And More!

Our local _____ chapter offers you the opportunity to attend high quality professional development seminars, (list chapter benefits here).

I know that you will find membership to be of great value. If I can be of further assistance, feel free to contact me at xxx/xxx-xxxx or at e-mail@yourcompany.com.

Sincerely,

Your name
Your position or role in the chapter.