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, which in turn will strengthen your chapter. 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 like professionals.

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

This task, while at first may seem overwhelming, 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.

You should always think

MEMBERSHIP

when planning chapter activities. Promote a “membership development” attitude within your chapter. Investing in membership development is investing in the future of your chapter and the risk management profession.

This handbook will provide you with suggestions on how to develop your Chapter’s plan and, more importantly, how to implement it to reach your goals and objectives.
II. Definitions

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 can be located at: www.RIMS.org/Bylaws

Corporate Member
This category of membership is available to any corporation, organization or legal entity whose individual representatives (known as “deputy members”) are salaried employees of the organization requesting membership and who provide the internal risk management function for the benefit of the member. The corporation, not the individual, holds this membership. If a Deputy leaves the member company, the membership remains with the company.

Associate of the Society
This individually held membership is available to individuals who can confirm their commitment to uphold and further the risk management discipline, and who are NOT eligible for deputy membership. This membership is available to the vendor or service provider – Ex. a broker, lawyer, consultant, account executive, outsourced risk manager, etc. An individual who works with clients of their employer is eligible to be an Associate.

Educational Member
This is an individually held membership for an educator who is a faculty member teaching risk management, insurance or benefits courses or chairing a department that offers risk management, insurance or benefits courses.

Student Member
Student membership is available to any full time student enrolled in at least 12 credit hours per term at a college or university, who is not eligible in any other membership category.
Affiliate Member
Affiliate membership is for any current deputy member upon separation from their current place of employment. The dues are subsidized in this membership category which is renewable once, for a maximum of 2 years from the date of separation.

Honorary Member
Only the Board of Directors of RIMS confers honorary membership. This distinguished honor is awarded to an individual who has served as an officer or director of RIMS and has made outstanding contributions to the advancement of RIMS. If he or she was not eligible to be a deputy member of RIMS, he or she must have made contributions to risk management/benefits and/or the insurance industry, which are considered to be unusually outstanding as determined by the Executive Council. This honor is conferred for the duration of the individual’s life.

Retired Member
This is for the Deputy Member, Educational Member or Associate of the Society who was previously employed in risk management or one of its related specialties prior to retirement.

Chapter Only Members/Affiliation
Remember that “chapter only” members are not members of RIMS. Non-member individuals only receive information from your local chapter and do not pay Society dues. Accepting chapter only corporate members is prohibited by the RIMS Constitution & Bylaws! You must advise these individuals that they are not members of RIMS and you should offer them the opportunity to join. RIMS receives many phone calls from irate “chapter only” members who don’t know they aren’t members of RIMS, and who weren’t aware that they had the option to join. Be sure to offer them the opportunity to receive all the benefits of RIMS membership.
III. Dues Structure

2007 Dues Structure – Society

Corporate Membership
Dues are $465 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 involved with the company’s internal risk management function. Additional deputy members may be added for $150 U.S. each per year, plus any applicable local chapter dues.

Associate of the Society
Dues are $485 U.S. per year, plus any applicable local chapter dues.

Educational Member
Dues are $100 U.S. per year, plus any applicable local chapter dues.

Student Member
Dues are $50 U.S. per year, plus any applicable local chapter dues.

Affiliate Member
Dues are $75 U.S. per year, plus any applicable local chapter dues.

Honorary Members
There are no dues collected from Honorary Members.

Retired Member
Dues are $100 U.S. per year, plus any applicable local chapter dues.
IV. Member Benefits

Your chapter chooses the amount of dues each membership category will be charged 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. It is important that your chapter treasurer complete the request sent out annually by RIMS for updated chapter dues in order to ensure that the correct dues are billed.

When selecting your annual dues amounts, be sure that there is value for what you are charging.

RIMS recommends that your chapter charge dues per deputy member instead of per Corporate Member.

It is also 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 on the list below. Membership in RIMS can make a difference. Consider the many benefits of membership.

**Networking** – Meet other Risk Management professionals through our Global Network.

**Local Chapters** – attend chapter meetings to enhance your education, get involved on committees, and get the most out of your membership.

**E-Groups** – Answers available at your fingertips. Have a question about insurance coverage? Disaster Management? Use the online E-Groups to communicate with other risk management professionals to find solutions.

**Risk Management Directory** – Deputy members have access to an online directory of Risk Management professionals.

**Enhance your Education** – RIMS offers courses for you to enhance your skills and knowledge. Obtain your ARM, CRM or RIMS Fellow designation.
RIMS Annual Conference & Exhibition – Attend and experience first hand the largest gathering of professionals dedicated to the advancement of risk management. Over 150 educational sessions are offered. Members receive a substantial discount off the cost of registration.

Government Affairs – RIMS is actively involved in influencing legislation and regulation that impacts risk management in Congress, on the state level, and on the Canadian federal and provincial levels. RIMS provides all of its members with the opportunity to learn more about risk management issues and how to effectively communicate with legislators at its annual "RIMS on the Hill" legislative conference in Washington, DC. The Society represents its members, the buyers of commercial insurance, through partnerships with the Occupational Safety and Health Administration (OSHA) and the Environmental Protection Agency (EPA). RIMS is also continuously engaged in dialogue with the National Association of Insurance Commissioners (NAIC), members of the insurance industry, and other entities affecting risk management.

Risk Management Magazine – The premier magazine for in-depth articles and coverage of risk management issues.

Career Services – Have a risk management position to fill? Use the RIMS Job Bank to target over 10,000 risk management professionals. Search resumes online. Members receive a discount on postings. Looking for a job? Search the online Job Bank for current posted positions. Write and format resumes, take professional assessments.

RIMSCOPE & RIMSCANADA Newsletters – RIMSCOPE is our bi-monthly online, interactive newsletter. RIMSCANADA is our quarterly newsletter. Both provide information on RIMS activities, chapter events, legislative issues, and professional development courses.

RISKWIRE – Members receive a daily listing of the most relevant risk management headlines/stories delivered to your e-mail box.

Volunteering – Not only will you have the opportunity to serve on a Society committee and be involved with setting RIMS goals and objectives, but you'll also gain benefits that will help you grow personally and professionally, leadership experience, satisfaction through helping others, and networking. Get involved! This is your association.
Professional Affiliation & Recognition – Take pride in belonging to the premier association for risk management professionals.

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 criteria to look at when developing a plan to increase your Chapter’s membership.

Determine your Chapter’s goals and objectives – These should be both short and long term. Remember, the quest for members does not stop after you make the first contact. It is an ongoing process. Set realistic expectations for all parties involved and make them aware of what is expected. If expectations are set too high, then there is a sense of failure. This should be avoided, as it will affect the rest of your campaign and the overall morale of the volunteers.

Observe your chapter – Determine the image of the organization, member satisfaction, changing demographics and the 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? What is your chapter’s image in the community? Does it even have one? It is difficult to plan if you don’t answer these questions first.

Do your homework – What’s already been done? Why was it done? What needs to be done? Has your chapter held a membership drive in the past? How long was the campaign? Was it successful? If a membership drive had not been held, why not?

Look at your current situation - You need to know who you are before you can start filling member needs and 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?

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.
What are you trying to achieve? – 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?

How are you going to achieve this? – Develop a timeline or a step-by-step plan. This will help you to see the bigger picture of the campaign. You'll be able to plan all the steps – such as who will write the pitch letters and by when? When will the phone calls start? Decide if your membership campaign will be short-term or all year-long. Outline what you will need to do to reach your goals. Are you going to have a membership drive by mail? By phone? Are you going to run a “Bring A Member” campaign?

Results and Evaluation – 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, serve as committee volunteers and eventually become board members. New members bring with them new ideas, vitality, and succession. They will give your Board the opportunity to begin priming others for Board positions when they become available. New member’s 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 dedicate their time to. If YOU don’t believe that it is worthwhile, neither will anyone else.

Now that you know what the benefits are to increasing your chapter’s membership, what can you do to determine the overall perception of your chapter? What are the outside factors that influence the success of your chapter?

Start internally; take 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. Consider utilizing the PERK program offered by RIMS [www.RIMS.org/PERK](http://www.RIMS.org/PERK) Not only will you learn what your active members are thinking, but it will also give you the opportunity to reconnect with members that you have not seen in awhile. 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. Track the inactivity of members, as well as those who participate. Each and every firm is a player in the industry and their affiliation adds to the overall effectiveness of your 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.

**Why do people become involved?** There are many answers to this question, but usually it will boil down to a few basic needs.

- **What’s in it for me?** People tend to join groups, including associations for professional or for personal gain. You’ll need to advise your potential members what skills and knowledge 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. As a RIMS member they will have access to other Risk Managers within the same industry. Think of all the knowledge and experience your members possess at one chapter meeting! Ask them what they need and what they are looking for and tell them why RIMS can help them. Don’t spend time touting benefits the individual or company isn’t interested in. You must LISTEN to what they want then give it to them.

- **The desire to belong** – People want to be able to network, have fun, and build quality relationships that fulfill personal and professional needs. These people are the joiners; they enjoy being part of a team.

- **The desire for recognition** – Belonging to RIMS and your chapter offers credibility and status. A person who is a professional and proud of it, may respond to your offer of membership with eagerness.
Take a moment to answer these questions:

Why did you become involved?
Was it one of the reasons above?
A reason all your own?

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, and just might be the reason that someone is waiting for to encourage him or her to join.

Doing your homework is an essential part of the membership drive program. As a board, develop a list of questions and answer them to help you determine the best ways to implement your campaign. What is the value of joining? Promote your chapter meetings and the speakers that participate with your group, include testimonials, don’t say “We have the best speakers…join and find out.” - Your chapter’s services should be valuable enough to encourage membership. If you give those services away for free to non-members you will never entice anyone to become a member.

Services that are intangible, such as networking, a sense of belonging, etc. should not be overlooked when assessing the value of membership. Equate networking with solution sharing. For some, this is more important than the educational programs you might offer. If the chapter is not responsive to the needs of its members, someone else or another group will be.

Do not get discouraged – 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

Develop an outline to get you started – this will give your plan a beginning and an end and will ensure that you have not forgotten any steps. More in depth explanations follow this outline.

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 duration.

Step 3- Budgeting
- Now that you know what you want to accomplish, how much money do you have to spend?
- Understand your chapter’s finances.
- Designate funds for the campaign.

Step 4 – Creating the Plan
- Decide what needs to be done to achieve your goals, set dates and assign people to be responsible for various parts of the project.
- Affirm goals and begin implementing your plan.
- Identify where to find prospective members.
- Obtain lists.
- Assign someone to write the prospect letters.
- Select the content of your membership packets.

Step 5 - Implementing the Plan
- Divide lists and qualify prospects.
- 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.
Begin follow up to letters that were sent out.
Meet as a group to share findings.
Set up phone trees for calls.
Assign each prospect to a chapter member who will be responsible for calls, follow-up, questions, etc.
Find out as much as you can about the prospects.
Communication between members is key to any plan working.
Hold a chapter meeting focused on New Members/ New Prospects.

If holding a telephone campaign:

- Obtain Lists
- Qualify lists
- Recruit volunteers
- Secure facility to make calls
- Write phone script
- Obtain prizes
- Train callers
- Develop plan for follow-up

Step 6 – The Meeting

During The Meeting

- Make sure your meeting starts and ends on time.
- 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 new comers.
- Don't allow the board to sit together.
- Make sure that your program is relevant and engaging. Combine speaker and hot topic.
- Focus on the benefits of membership after the program.
- Use testimonials.
- Facts tell, stories sell.
After the Meeting

- Timely follow up
  - "Thanks for coming" letters, plus ACTION. “Join us at our next meeting.”
  - Send “Sorry we missed you” letters.
- Keep on the mailing list for 3 months only.
- If you keep your meeting open to non-members all the time, there’s no incentive to join and you will alienate those that have paid dues.
- Maintain telephone contact.
- Take a prospect to lunch.

Step 7 – Follow-up and Maintenance

- Call the prospective members and who attended the meeting. Thank them; remind them to complete a membership application if they have not already joined.
- Send thank you notes to those who have joined.
- Introduce new members in your newsletter.
- Make new members feel that they are an important and special addition to the chapter.
- Conduct a follow up mailing to those that did not join to say “Sorry we missed you”.
- 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 for. 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 monthly newsletter. Remember everyone has volunteered his or her time.
Step 9 – Retention

- Welcome new members with a letter from the President 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.
- Continue to stress the value of membership.
- Have a plan for new members to become active members.
- Don’t threaten members to become involved.
- Ask new members for their opinion.
- Don’t complain about others or the chapter to new members. •Create an air of excitement about being involved.
- Recognize those people who do get involved.
- 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 member’s 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. Everyone must support the campaign since promoting and encouraging RIMS membership is everyone’s responsibility.

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. You can do this by taking a quick survey 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 the morale of the group high? Is your meeting attendance acceptable? If the chapter is not succeeding in at least one of 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 you want to increase. You must promote membership to the type of individual or corporation representative based on the ability of your chapter to satisfy the needs of that group. 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 quota 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 two fold. 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. Will it be a yearlong program where the chapter’s focus is membership or will it be a one-day event that is worked towards over 6 months?

Step 3 - Budgeting

By now, your chapter has agreed on what type of campaign you want to run and the goals it hopes to attain. 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.

Just as important as keeping accurate membership records is the need to make sure your chapter’s books are in order. It is impossible to develop a budget for a program if you don’t know how much you have to start with or how much you will require for the program. Some chapters have used the services of independent auditors to ensure that there is no impropriety, which is recommended.

When setting your budget and deciding on the type of program to run, you might want to consider making the 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. This includes writing the prospect letter, writing thank you notes, assembling the membership kits, qualifying prospect lists, etc. 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. This cannot be a project where only the Membership Director gets involved and does the work. This is a Chapter commitment. At the onset of the program, reaffirm the goals so that everyone is starting off on the same page.

So, you’ve created the plan, and set deadlines, now what about prospective members?

“Where are we going to find our prospective members?” Prospects can be found by using your brokers, other association directories such as PRIMA, ASSE, ASHRM, CPCU, trade press subscribers, commercially available mailing lists, Chamber of Commerce, purchasing lists, such as from Dun and Bradstreet or using the Yellow Pages. Additionally, RIMS online E-mail manager allows you to pull non-member prospects in your local area.

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. There is nothing worse than receiving a letter addressed to “Dear Risk Manager”, having a person’s name misspelled, or identifying someone by the wrong gender, as it increases the possibility that the information will be thrown away.

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 must 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.

Another place often overlooked, to find new members is your own “Chapter” Members or “Friends” of RIMS. RIMS does not recognize these categories of membership. These individuals do not pay RIMS Society dues, nor do they receive the full benefits of being RIMS members. By joining RIMS on the Society level your chapter will not lose them as members. RIMS requires that all members belong to their local chapter.

RIMS staff often receives phone calls from people who are disappointed that their chapter never told them that they could join the Society. They didn’t even know the option existed. This is especially true of the members who qualify for the Associate of the Society category. Service providers are not always aware that this category of membership exists. As leaders of RIMS it is up to you to make sure that all your members and all potential members are aware of all the membership options and benefits available to them. If you are not sure what category of membership someone is eligible for, please call the Membership Department at 212-655-6040.

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

Whether you are conducting a phone or e-mail campaign, assign someone the task of writing the introduction or prospect letter. A sample can be found at the back of this book. Make sure that the letter highlights the benefits of membership, as well as the programs that your local chapter has coming up. 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 for the hotel make sure to put in an RSVP date that is reasonable. With everyone so busy, it is important to give people enough time to rearrange their schedules if necessary. Always make sure that the letter provides the phone number of someone to contact for further information or question. This goes for all your chapter correspondence. Your members and guests should be told over and over who to contact for more information.

Each committee member should be assigned a list of prospective members to contact. These are called phone trees. 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. Hold monthly meetings of the membership committee to address questions, issues and to update on progress. These can be held in person or by conference call. Communication between the groups of volunteers is key for this program to work. If you are conducting this membership campaign as a telephone drive, be sure that there is 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.

The responsibility of putting together the membership packets should be divided amongst the membership committee and any willing volunteers. If you will be sending hundreds of kits, make the event enjoyable by bringing in lunch and music, whatever it takes to get everyone motivated.

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 Meeting

Assuming these guests will attend your chapter meeting, your chapter members 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. Be sure that your Chapter’s Board does not all sit at one table. Use nametags to promote conversation. Consider color-coding nametags to identify new comers. It is the job of every member to be friendly and open. When a person is at ease, he or she is more likely to have an open mind. An open mind 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.

Since this is a meeting to “sell” membership to RIMS and your chapter, the best way to do this is by having several Board and chapter members prepared to 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.

After the Meeting

Make sure to send a letter thanking each person 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 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. Develop telephone trees among your officers. Each officer is responsible for maintaining contact with a designated list of deputy members, as well as, prospective 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 7– 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 chapter has received an application and payment. Decide on a point person to handle all the callbacks and “close the sale”. 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 notice. 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 hand written thank you notes to your new members, along with a welcome packet. A chapter welcome packet should include a welcome letter from the President, an introduction of your chapter’s board members, updates on any upcoming meetings, your chapter’s Web site address, a copy of the chapter’s Constitution and Bylaws 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 allows you to make sure that your chapter is meeting his or her expectations, and you are on your way to maintaining a member on a long term basis. In your monthly newsletters, be sure to list all the new members correctly with their company names. If space allows, you might want to include brief biographies. Your chapter might want to develop an annual meeting that is an orientation for new members. The purpose is 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 encouragement, 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.

How many new members has the chapter gained from this effort? It’s ok if there are not as many new members as you had expected. Don’t be discouraged as this is not always an easy task and is an ongoing effort.

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, whether it was bringing the refreshments for the group, writing letters, making phone calls, or organizing the meeting.

Feature your volunteers in your chapter newsletters. 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.
According to the Association for Volunteer Administration, 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. Use a committee as a stepping-stone. Promote opportunities for volunteers through ads in your chapter newsletter, personal telephone calls, sign-up sheets in welcome packets, targeted mailings, and promoting 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 members that 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 changing meeting times to permit members to attend during alternative times.
• Consider forming a car pool to meetings if a large number of your members are located in the same area.
• Develop high-level chapter projects 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.
• 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.
• Don’t threaten members to become involved.
• 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 goal.
➢ Review your resources.
➢ Decide the method of recruitment.
➢ Consider an incentive to join.
➢ Develop your message and establish your focus.
➢ 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. Usually 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 212-655-6040 or membership@rims.org. You can also use the online Chapter Officers E-Group to post your questions through the RIMS Web site. If you have not already done so, be sure to subscribe to this E-Group.
o Login to the RIMS Web site by using your e-mail address as your login, and your last name as your password. (Unless you have already changed your password).

o Click into E-Groups in the Products and Services area. This will display a full listing of all the available E-Groups.

o You will see listed under the header “Members Only Interest Groups” an E-Group for “Chapter Officers”. If you do not see a check mark in front of the group name, you are not yet subscribed.

o To subscribe, click on the words “Chapter Officers”, you will then see a screen that will ask you how often you wish to receive messages.

o Click the orange Subscribe button and you will be registered to take advantage of this great resource.

o To send a message to the E-Group – Click into the envelope icon next to the E-Group that you want to reach.

o Click Send Message.

o To reply to an existing e-mail. Click the Reply button on your e-mail message or if you are viewing archived message, click on the Reply button.

Remember there are 80 other chapters and their 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.
Ideas for Recruitment 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

Use this letter on chapter letterhead* when you have had no prior contact with the individual.

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., you will have access to the networking, professional development and discounts available to all members.

RIMS members receive a host of benefits, including:

- 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;
- RIMSCOPE, the Society's online newsletter;
- Substantial conference discounts;
- Networking at the local chapter level;
- Access to online Career Center;
- 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 e-mail@yourcompany.com.

Sincerely,

Your name
Your position or role in the chapter

To Download Chapter Letterhead:
- Go to www.RIMS.org
- Login as yourself
- Click into Chapters > Chapter Officer Tools and Resources
- Resources > Stationery & Templates
Sample Recruitment Letter

Use this letter on chapter letterhead* when you have had some prior contact with the individual.

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;
- RIMSCOPE, the Society’s online newsletter;
- Substantial conference discounts;
- Networking at the local chapter level;
- Access to online Career Center;
- 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.

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