

**MEMBER
RETENTION
TOOLKIT**
for
**ACDA STATE
CHAPTERS**

American Choral Directors Association

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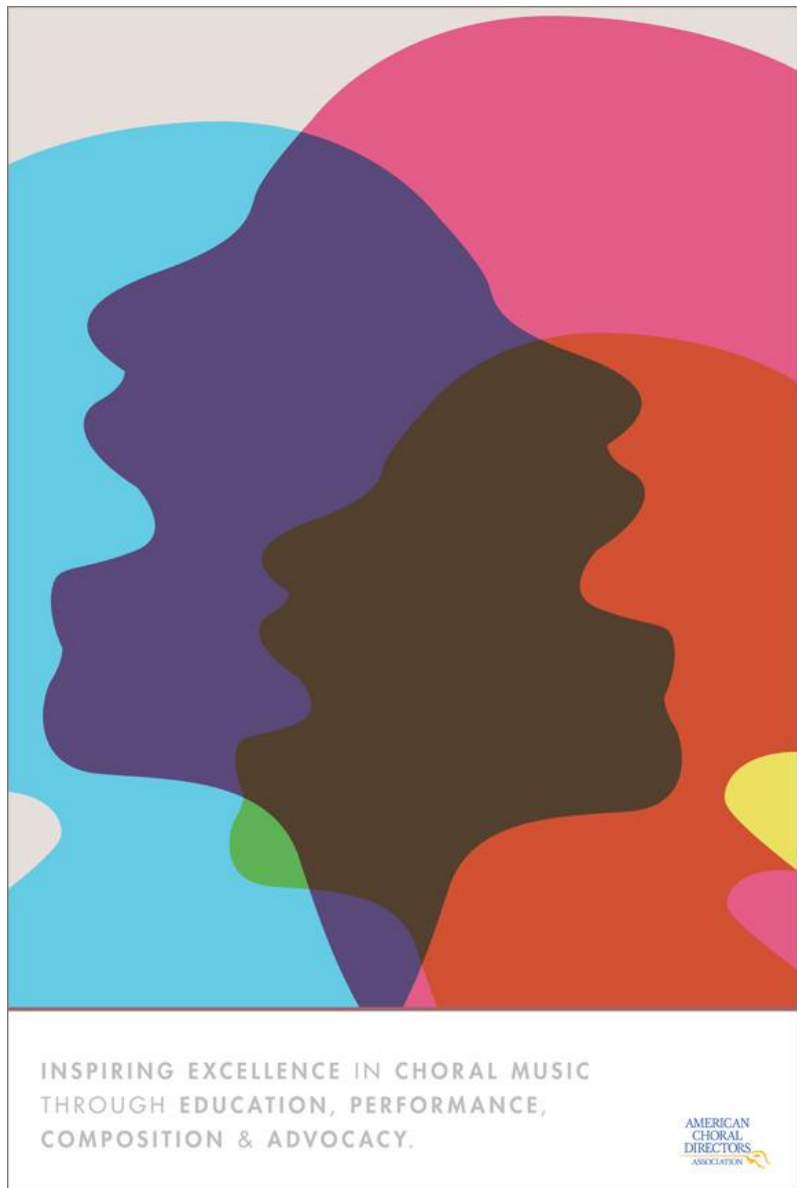
A Retention Plan Toolkit

Does your state have a member retention plan for your state?

Are you using it? If so, you are ahead of the game. Congratulations!

If not, we urge you to **create one**. The process of developing a plan can be a first step toward thinking strategically about your membership and ways that your state chapter can ensure that you are in tune with your members' interests and needs, as well as growing and adding new members to support your mission.

This toolkit is designed to help you get started. If you have other mechanisms in place that work – keep them! In fact, if you are doing something that really seems to work for you, share it. We have Facebook groups for “ACDA Leadership – State Presidents/Pres. Elect” and “ACDA Membership Chairs,” which are perfect for sharing peer advice among state leaders.



Even if your state has a plan, please scan the contents to see if a new idea is sparked. **Think about adding in one new action** to the ways you are currently engaging your members.

Starting off **Right**: Welcome New Members

This is your first chance to communicate to a brand new member what being in ACDA means, and how their fellow members relate to them. With the new member welcome kit sent out from the National Office within two weeks, the basics of national membership benefits are covered.

Your state follow-up is your opportunity to share **what is special about your state** – state conferences, workshops, festivals, newsletter, website, and so on. You can also include suggestions on ways they can get involved – with R&R committees, your state event, and so on.

Tip: Make it timely (the sooner the better), make it personal (use their name) and make it special (something focused especially on new members). Ideas:

- ___ Send a **personalized email of welcome** to new members in the first month.
- ___ Send a **personalized letter of welcome** to new members in the first month.
- ___ Organize board members, membership chair, R&R committee chairs and/or other member volunteers to ensure that each new member receives a **call or email welcoming them** sometime during new members' first two months.
- ___ Organize board members, membership chair, R&R committee chairs, and/or other member volunteers to write and mail **handwritten notes** to new members. It doesn't have to be long or complex. Just show you are paying attention to new members.
- ___ Offer new members a **"buddy" relationship with member volunteers** who know the ropes. You could even create a "member ambassador" pool of current members who are willing to be matched with new members by area of interest, expertise, age, or other shared quality.
- ___ **Recognize new members** in your newsletter, your website.
- ___ Use social media (Facebook or Twitter are excellent) to welcome new members.
- ___ Do a **check-in call or email in new members' ninth month**, to ensure they get a personal contact before their first renewal reminder letter arrives.
- ___ We will welcome **another way**. Please describe: _____

Communicating with Members

ACDA state chapters and organizations vary widely in their infrastructure and communications schedules. Here are some ideas to consider:

___ When you receive your current membership list, **check to see if every member has an email address** listed – and reach out to invite them to provide one if they haven’t already. Members are often not aware of what they are missing when we can’t email them. For example, no monthly emails sharing new benefits, upcoming events, and ACDA’s latest news; they miss some of the renewal reminders; and they don’t receive automatic notifications and eBallots for elections done online. Finally, student and associate members don’t get the *Choral Journal* unless they proactively go to acda.org and log-in to find the e-version.

___ If you don’t send any **state-level communication** to your members, start something that makes a connection with members at least once every other month. Please describe: _____

___ Alternately, recruit another member to **periodically send an email** with news about your state event, upcoming workshops, etc.

___ If your **website is not up to date** (with news of your upcoming state conference and/or workshop, as well as current leadership), make that a top priority to remedy. Include the URL on all of your communications with members.

___ To up your game in communications, you can try out MailChimp (www.mailchimp.com) or Constant Contact (www.constantcontact.com), **email marketing** companies. Both are low-cost, or in some cases free, and allow you to integrate graphics, ensure your messages are mobile-friendly, track opens and clicks, and schedule your sends.

___ **Especially for Students:** Since one challenge with student members is oft-changing contact information, it is smart to take some time during the winter or spring to ensure that student members have a personal email listed, not just their school address. (Please be sure to share updates with the national office, or ask members to update their information online with us.)

___ **Add one additional communications “touch” point** to your calendar this year. Please describe what that will be: _____

Other Orientation/Engagement Ideas

There is a direct correlation between how engaged members are with you and their renewal rates. Following are some other ideas for your consideration.

- A number of states offer a **pre-meeting or orientation at their conference** designed to gather first-time attendees together so that they can find a conference buddy and receive tips for making the best of the event.
- Spread the mentoring love. If your state has a mentoring program, ensure members know about it. If you don't, encourage your members to take advantage of **ACDA Mentoring** (mentoring.acda.org).
- Help to **educate members about available benefits**. One way is to highlight some of the new benefits (*Musica*, ACDA Mentoring, ACDA Career Center, etc.), as well as to share your favorite aspects of *Choral Journal*, *ChorTeach*, and conferences.
- Ensure that you always **have new leaders in the pipeline**. When you regularly have new people invited into leadership roles, your members notice. Use any and all available volunteer leadership roles to invite people you know would be good leaders, but keep widening your circle and ensuring that you bring new blood into volunteer and decision making circles. **Tip:** Making the invitation personal is much, much more effective than simply posting an opening.
- Never miss an opportunity to help members **celebrate accomplishments**. Social media is a great way to share event listings, awards, promotions, and other news that everyone will appreciate.

When Members Don't Renew

Experience has shown that most members who let their membership lapse do so because they have simply forgotten to renew. There are other reasons, of course, but a variety of renewal reminders are an important part of a good retention plan.

While the National Office sends at least four reminders prior to a member's lapse date, and three following it (and continues to periodically contact lapsed members for several years), a state reminder can have more impact on many members. Ideas:

- ___ At least once a month, access your membership dashboard and export the list of Current Members, sort by Paid Through Date, and send every member who will expire that month a personal email encouraging them to renew.
- ___ Using the Lapsed Members report on the dashboard, export the list and sort by Paid Through Date. Call or email every member who lapsed within 30 days to encourage them to renew/reactivate their membership.
- ___ Periodically contact your recently lapsed members by email or phone to tell them you have missed their participation. That is also a good time to highlight new member benefits, or an upcoming state activity.
- ___ Invite a student chapter to help make calls to lapsed members, encouraging people to rejoin. It's a great way for students to get service hours and "meet" new people, and former members are often more receptive to calls from students than to calls from others.

For Your Information: Retention Work at the National Office



Membership & Communications
Coordinator: Trina Kopacka

Director of Membership &
Communications: Sundra Flansburg

The National Office contacts members on a consistent schedule.

Member Communications – New & Renewing:

Week 1	Email confirming membership/renewal, including log-in information
Week 2-3	Membership packet with benefits brochure, membership card, etc.
Month 1	Start receiving monthly member benefits emails, including <i>e-Choral Journal</i> , which continue monthly
Month 2	Active, Life, and Retired members begin receiving print <i>Choral Journal</i> , which continues monthly

New Member Welcome:

Week 1-2	New members start getting weekly emails for 5 weeks welcoming and introducing them to benefits.
Week 6-7	General email welcome series ends, invited to sign up for additional 5-week email series if they are K-12 educators, students, or music in worship
Week 10-11	Last of optional welcome series is sent
Month 4	Personalized welcome letter checking in and highlighting key benefits

Renewal Reminder Series:

Month 10	The first renewal reminder is a postcard mailed to the member
Month 11	The second reminder is a personalized letter mailed to the member
Month 12	The third reminder for Active, Life, and Retired members is a sticky note on their "last" print Choral Journal All about-to-lapse members receive an email reminder at the first of the month, and a second one mid-month Members who have opted in to text reminders receive a text at the first of the month and another mid-month
Lapse Month 1	A member benefits email sent with a note about what they are missing
Lapse Month 2	Email lapsed membership notification sent.
Lapse Month 4	A lapsed member survey is emailed, asking for feedback on why they didn't renew

Lapsed Member Reactivation:

January	Email to members who have lapsed anywhere from 6 months to 5 years
March	Letter to members who have lapsed anywhere from 6 months to 3 years
September	Email to members who have lapsed anywhere from 6 months to 3 years